

2007 BLS CEQ Interview Requirements
November 15, 2006

Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
01C	MAJCODE 05 06	REFRIDG HM_FREEZ	<p>Variable - REFRIDG</p> <p>CURRENT WORDING:</p> <p>How many refrigerators [fill: do/does] [fill: YOU_YRCU] have?</p> <p>SPECIAL INSTRUCTION:</p> <p>Stores 05 in MAJCODE and REFRIDG in MAJAPPLQ</p> <p>-----</p> <p>Variable HM_FREEZ</p> <p>CURRENT WORDING:</p> <p>How many home freezers [fill: do/does] [fill: YOU_YRCU] have?</p> <p>SPECIAL INSTRUCTION:</p> <p>Stores 06 in MAJCODE and HM_FREEZ in MAJAPPLQ</p>	<p>Collapse the two questions for refrigerators and home freezers into one question -</p> <p>Variable - REFRFREEZ</p> <p>NEW WORDING:</p> <p>How many refrigerators and home freezers [fill: do/does] [fill: YOU_YRCU] have?</p> <p>SPECIAL INSTRUCTIONS:</p> <p>Store 05 in MAJCODE and REFRFREEZ in MAJAPPLQ</p>
02	RTCOMPX	RTCOMPX	<p>CURRENT WORDING:</p> <p>What is the rental charge to another tenant for a similar unit?</p>	<p>Change the question wording to ask for the monthly rental amount for a similar unit.</p> <p>NEW WORDING:</p> <p>What is the current monthly rental charge to another tenant for a similar unit?</p>
02	RTCMPPD	RTCMPPD	<p>CURRENT WORDING:</p> <p>What period of time does this \$ [fill: RTCOMPX] cover?</p>	Delete this variable
02	RTCMPOTH	RTCMPOTH	<p>CURRENT WORDING:</p> <p>* Specify:</p>	Delete this variable
02	MORERENT MORERNT	MORERENT MORERNT	<p>CURRENT WORDING:</p> <p>Since the first of [fill: REF_MON] have [fill:YOU_ANYMEM] rented any houses, apartments, or temporary living quarters NOT used for business or vacation?</p> <p>* Do NOT include college or university regulated housing.</p>	<p>Reword - Change "...NOT used for business..." to "...NOT used entirely for business...:</p> <p>NEW WORDING:</p> <p>Since the first of [fill: REF_MON] have [fill:YOU_ANYMEM] rented any houses, apartments, or temporary living quarters NOT</p>

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				used entirely for business or vacation? *Do NOT include college or university regulated housing.
02	RENTCONT	RENTCONT	NA	New Question This question will be asked after RTBSNS or RTBSNSZ [Universe (RTBSNS = 2, D, R) OR (RTBSNSZ = 1-100, D, R)] for certain PSUs. BLS provided the list of PSUs in a separate document. QUESTION WORDING" Is this unit under rent control? 1. Yes 2. No Skip <1, 2, D, R> [goto MORERNT]
03A 1	See Attachment A	See Attachment A	See the 2006 Section 03A1 specification for the specific 2006 question wording and flow	See Attachment A for the specific question wording and flow for the mortgage questions in Section 03A1 beginning 2007. Each affected variable is listed below also.
03A 1	MCHANGE	MCHANGE	See the 2006 Section 03A1 specification for the specific 2006 question wording and flow	The question wording and skip patterns are changing for this variable. See Attachment A for details.
03A 1	VARRTJ INTONLJ OTHRTJ	PAYTYPJ	See the 2006 Section 03A1 specification for the specific 2006 question wording and flow	The question wording, valid values, and skip patterns are changing for this variable. See Attachment A for details.
03A 1	PRYINIJ	PRYINIJ	See the 2006 Section 03A1 specification for the specific 2006 question wording and flow	The question wording, valid values, and skip patterns are changing for this variable. See Attachment A for details.
03A 1	M RTPMTJX	M RTPMTJX	See the 2006 Section 03A1 specification for the specific 2006 question wording and flow	The Universe for this variable is changing. See Attachment A for details.
03A 1	PRININJX	PRININJX	See the 2006 Section 03A1 specification for the specific 2006 question wording and flow	The Universe and fills for this variable are changing. See Attachment A for details.
03A 1	MORTCHMO	MORTCHMO	See the 2006 Section 03A1 specification for the specific 2006 question wording and flow	The Universe for this variable is changing. See Attachment A for details. Also, change the valid values for

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				this variable to <1-12, D, R> keeping the current skip. Remove ERR3 but add a soft edit that is invoked when the selected month is outside the reference period.
03A 1	PYMTJX1 PYMTJX2 PYMTJX3	PYMTJX1 PYMTJX2 PYMTJX3	See the 2006 Section 03A1 specification for the specific 2006 question wording and flow	These are new questions being added. See Attachment A for details. Use the same range edits as MRTJX.
03A 1	PRNINJX1 PRNINJX2 PRNINJX3	PRNINJX1 PRNINJX2 PRNINJX3	See the 2006 Section 03A1 specification for the specific 2006 question wording and flow	These are new questions being added. See Attachment A for details. Use the same range edits as PRININJX.
03A 1	PAIDLOAN	PDLOAN2	Currently responses to this question of 2, D, or R to skip to the next loan or ADDMORT.	The skip for a responses of 2, D, or R need to go to TOTOWED2. Do not trigger special instruction 2 for TOTOWED2 when PD2AMTX3 eq B.
03A 1	NA	PCODE	CURRENT WORDING for code 1: 1. A second home, vacation home or recreational property.	Change the wording for code 1 to include timeshares. NEW WORDING: 1. A second home, vacation home, recreational property, or timeshare.
03A 1	NA	NPROP2	CURRENT WORDING: How many second homes, vacation homes, or recreational properties?	Change the question wording to include timeshares. NEW WORDING: How many second homes, vacation homes, or recreational properties, including timeshares? * Exclude right-to-use timeshares, vacation clubs, or destination clubs. Also, create a help screen for this variable that provides examples of terminology of included and excluded expenses. For example, fractional timeshares usually refer to a deeded timeshare and are included in Section 3, while points generally refer to a vacation club and are excluded. The content for

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				this help screen will be provided by BLS.
03A 1	NA	ADDMORT	CURRENT WORDING: Since the first of [Fill REF_MONTH], [Fill HAVE_HAS2] [Fill YOU_YRCU] obtained any [fill: additional] mortgages, including second mortgages or home equity loans, for your [Fill: 8500.PROPDESC]?	Add an additional fill when AGE62 = 1 NEW WORDING: Since the first of [Fill REF_MONTH], [Fill HAVE_HAS2] [Fill YOU_YRCU] obtained any [fill: additional] mortgages, including second mortgages or home equity loans, for your [Fill: 8500.PROPDESC]? [if AGE62 = 1 fill: Do not include reverse mortgages.]
03A 2	NA	SECHOME	CURRENT WORDING: ...a second home, vacation home, or recreational property?	Change the question wording to include timeshares: NEW WORDING: ...a second home, vacation home, or recreational property, including timeshares? * Exclude right-to-use timeshares, vacation clubs, or destination clubs. Also, create a help screen for this variable that provides examples of terminology of included and excluded expenses. For example, fractional timeshares usually refer to a deeded timeshare and are included in Section 3, while points generally refer to a vacation club and are excluded. The content for this help screen will be provided by BLS.
03A 2	NA	P_TYPE H_PTYPE	CURRENT WORDING for code 3: 3. A second home, vacation home, or recreational property	Change the question wording to include timeshares: NEW WORDING: 3. A second home, vacation home, recreational property, or timeshare.
03A 2	NA	HWMANY3	CURRENT WORDING: How many second homes, vacation homes, or recreational	Change the question wording to include timeshares: NEW WORDING:

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			properties did [fill: YOU_YRCU] dispose of since [fill: REF_MONTH]?	How many second homes, vacation homes, recreational properties, or timeshares did [fill: YOU_YRCU] dispose of since [fill: REF_MONTH]?
03B	NA	WHICH_PROP	CURRENT WORDING for code 3: 3. Vacation prop, second home, recreational property	Change the question wording to include timeshares: NEW WORDING for code 3: 3. Vacation prop, second home, recreational prop, timeshare
03B	PROPDESC	PROPDESC	CURRENT FILL INSTRUCTION #3: If OWNYB = 300, fill "Vac home/sec home"	Change fill instruction #3 for OWNYB = 300 as follows If OWNYB = 300, fill "Vac./sec./rec. prop or timeshare"
03B	PROPDESC	PROPDESC	CURRENT SPECIAL INSTRUCTION #2: If OWNYB = 300, pre-fill "Vac home/sec home"	Change special instruction #2 for OWNYB = 300 as follows If OWNYB = 300, pre-fill "Vac/sec/rec/time"
03B	PROPDESC	PROPDESC	NA	Add the following special instruction: If OWNYB = 100 and BUILDING (from section 1B) = 1 (Single family detached), 9 (Mobile home or trailer), or 10 (College dormitory), set PROPTYPE = 3.
03B	PROPDESC	PROPDESC	Currently this variable skips to STILOWNB for all property codes except 100.	Change the skip for property code 300 to goto TIMESHAR (see Attachment B for more details.)
03B	See Attachment B	See Attachment B	See the 2006 CEQ specification for Section 03B for the current flow and wording in this section.	See Attachment B for the specific question wording and flow for Section 03B timeshare questions beginning 2007. Each individual variable appears in the rows below.
03B	TIMESHAR	TIMASHAR	NA	NEW QUESTION: Universe - OWNYB = 300 and value in PROPDESC Is this a time-sharing arrangement where [Fill: YOU_YRCU] [Fill: HAVE_HAS2] use of the property only for a specified time period each year? 1. Yes - goto SHARWKS 2. No - goto SHARED2

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03B	SHARWKS	SHARWKS	NA	NEW QUESTION: How many weeks per year can [fill: YOU_YRCU] use your timeshare? Valid values <1 - 52, D, R> goto SHARED1
03B	SHARED1	SHARED1	NA	[fill: Do/Does] [fill: YOU_YRCU] own the timeshare with anyone else outside your CU? 1. Yes - goto SHARPER1 2. No - goto S3B_END
03B	SHARPER1	SHARPER1	NA	What percent of the timeshare [fill: do/does] [fill: YOU_YRCU] own? Valid values <1-99, D, R> - goto COUNTRY
03B	SHARED2	SHARED2	NA	Universe - OWNYB = ANY and TIMESHAR ne 1 [fill: Do/Does] [fill: YOU_YRCU] share ownership of the property with anyone else outside your CU? 1. Yes - goto SHARPER2 2. No - goto STILOWNB
03B	SHARPER2	SHARPER2	NA	What percent of the property [fill: do/does] [fill: YOU_YRCU] own? Valid values <1-99, D, R> - goto COUNTRY
03B	VPRPCODE	COUNTRY	Currently this question follows PROPTYPE and a response of 2, Foreign Country, skips to VSHARED CURRENT QUESTION WORDING: * Ask if not apparent Where [Fill: is/was] [Fill: the/this] property located?	Move this question so that it is asked after the new timeshare/shared ownership questions. A response of 2 will now skip to STILOWNB. Also add and FR instruction to the screen. NEW WORDING: * Ask if not apparent Where [fill: is/was] the property located?

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			1. United States 2. Foreign Country	* If this is a timeshare with multiple locations, select the most often used location. 1. United States – goto STATE 2. Foreign Country - goto STILOWNB
03B	VPRPCODE	STATE	Currently any response to this question skips to VSHARED	Change the skip for any response to CNTYCODE.
03B	FIPSCODE	CNTYCODE	NA	This field should mimic the coding of vehicle makes and models. What county is the property located in? * Enter the three character FIPS County abbreviation * If the county is not found, key X Valid values: <30 characters, D, R> [goto STILOWNB] <X> [goto OTHCNTY] 1. Insert a Blaise alpha search function. Give the FR the option of switching to a tri-gram search. Display the list of FIPS County codes (to be provided by BLS) and allow the interviewer to highlight and select the appropriate county. On the grid, replace the keyed-in characters in the "County" field with the FULL county name selected from the list. Then store the appropriate code in FIPSCODE. 2. If X is entered then store XXX in FIPSCODE. BLS provided the list of FIPSCODE values as a separate document.
03B	OTHCNTY	OTHCNTY	NA	NEW QUESTION: * Specify other county. Valid values: <30 characters> - goto STILOWNB

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03B	STILOWNB	STILOWNB	Currently this variable is placed right after PROPDESC in the form pane	Move this variable and all subsequent variables to after OTHCNTY. Change the Universe for this variable to reflect the new path for property codes of 300.
03B	ACQMETH	ACQMETH	CURRENT WORDING: How did [Fill: YOU_YRCU] acquire this property? * Enter the first answer that applies 1. A purchase, a contract with a builder, or a trade-in 2. A gift or inheritance 3. Other - specify	Delete this variable
03B	ACQOTH	ACQOTH	CURRENT WORDING: * Specify:	Delete this variable
03B	GIFTPROP	GIFTPROP	NA	NEW QUESTION to replace ACQMETH. Universe - If ACQIRMO/ACQUIRYP within the reference period. Question Text: Was this property received as a gift or inheritance? 1. Yes 2. No Description: Received as gift? Skip: <1, D, R> [goto ANPROPTX] <2> [goto OWN_PURX]
03B	PROPVAX	PROPVAX	CURRENT WORDING: About how much do you think this property would sell for on today's market?	Move this variable from Section 03B (EOPB) to Section 03I (EOP) just before RNTEQVX where it will be asked for only property types 100 and 300 but it will be asked every quarter.
03B	PROPTYPE	PROPTYPE	Currently this question is asked	Change the universe for this

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			for all properties except when OWNYB = 400	question so the question is not asked when OWNYB = 400 or (OWNYB =100 and BUILDING (from 1C) = 1, 9, or 10)
03B	VTIMESHR VSHARED	VTIMESHR VSHARED	<p>CURRENT WORDING:</p> <p>Variable - VTIMESHR</p> <p>[Fill: Do/Does] [Fill: YOU_YRCU] share ownership of the property with anyone else outside your CU?</p> <p>-----</p> <p>Variable - VSHARED</p> <p>[Fill: Do/Does] [Fill: YOU_YRCU] share ownership for the entire year, or is this a time-sharing arrangement where [Fill: YOU_YRCU] [Fill: HAVE_HAS2] ownership of the property only for a specified time period each year?</p> <ol style="list-style-type: none"> 1. Share ownership for entire year 2. Time-sharing arrangement 	Delete these variables.
03E	NA	PRESMORT	<p>CURRENT WORDING:</p> <p>Now I am going to ask about mortgages for your [Fill: PROPDESC]. Excluding home equity loans, [Fill:do/does] [Fill: YOU_YRCU] presently have a mortgage on your [Fill: PROPDESC]?</p>	<p>Add an additional fill when AGE62 = 1 (see change #176 for additional information on AGE62)</p> <p>NEW WORDING:</p> <p>Now I am going to ask about mortgages for your [Fill: PROPDESC]. Excluding home equity loans [if AGE62 = 1 fill: and reverse mortgages], [Fill:do/does] [Fill: YOU_YRCU] presently have a mortgage on your [Fill: PROPDESC]?</p>
03F	See Attachment C	See Attachment C	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	See Attachment C for the specific question wording and flow for Section 03F mortgage questions beginning 2007. Each affected variable is also listed below.
03F	REFINED	REFINED	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	Delete this question
03F	ORGMRTX	ORGMRTX	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	Make this question the first question in the section. The Universe, skips and wording will

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				change. See Attachment C for details.
03F	FRSTPYMO	FRSTPYMO	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	Move this question after FRSTPYR. Make all necessary skip and Universe changes. See Attachment C for details.
03F	MTERM	MTERM	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	The Universe and skip pattern for this question change. See Attachment C for details.
03F	MORTTERM	MORTTERM	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	The skip pattern for this question changes. See Attachment C for details.
03F	OLDMRRT	OLDMRRT	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	Delete this variable
03F	NEWMRRT	NEWMRRT	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	The Universe for this question changes. See Attachment C for details.
03F	FIXEDRTE	FIXEDRTE	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	The skip pattern for this question changes. See Attachment C for details.
03F	VARRTE INTONLY OTHRTE	PAYTYPE	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	The question wording, valid values and skip patterns for this question change. See Attachment C for details.
03F	PAYTOHF	PAYTOHF	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	The skip pattern for this question changes. See Attachment C for details.
03F	MRTPMPD MRTOTHF	MRTPMPD MRTOTHF	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	Delete these variables
03F	PAYINCL	PAYINCL	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	The question wording, valid values, skips, and Universe for this question change. See Attachment C for details.
03F	PAYOTHF	PAYOTHF	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	The skips for this question change. See Attachment C for details.
03F	MRTPMTX PRININTX	MRTPMTX PRININTX	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	The Universe, wording, and skips for these questions change.
03F	PAYMTX1 PAYMTX2 PAYMTX3	PAYMTX1 PAYMTX2 PAYMTX3	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	NEW QUESTIONS. See Attachment C for details.
03F	PRNINTX1 PRNINTX2 PRNINTX3	PRNINTX1 PRNINTX2 PRNINTX3	See the 2006 CEQ specification for Section 03F for the current wording and flow for this section.	NEW QUESTIONS. See Attachment C for details.
03H	PAIDLOAN	PAIDLOAN	Currently responses to this	The skip for a responses of 2, D, or

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			question of 2, D, or R to skip to the next loan or 3H_END.	R need to go to TOTOWED. Do not trigger special instruction 2 for TOTOWED when PAID LOAN = 2 and PDAMTX1 and PDAMTX3 eq B.
03I	INC_MORT MGMORTX	INC_MORT MGMORTX	CURRENT WORDING: Variable INC_MORT - Are any of the costs included in [Fill: YR_YRCUS] mortgage payment? Variable MGMORTX - How much per month?	Delete both of these variables and make any necessary skip changes. Any skips to INC_MORT should now go to MGOTHER.
03I	MGOTHER	MGOTHER	CURRENT WORDING: In addition to those costs, since the first of [Fill: REF_MONTH], have [Fill: YOU_YRCU] made ANY OTHER regular payments for these services?	Change the wording of this question. NEW WORDING: Since the first of [fill: REF_MONTH], have you made ANY regular payments for these services?
03I	SPPENCHG SPPENCHX	SPPENCHG SPPENCHX	CURRENT WORDING: Variable SPPENCHG - Were there any penalty charges as a result of the extra payments? Variable SPPENCHGX - Since the first of [Fill: REF_MONTH], how much were these penalty charges?	Delete both of these variables
3I	VAC_OCCQ	VAC_OCCQ	NA	NEW QUESTION. This question should be asked just after ASSESSMT/ASSESSX/ASSESSCX. Universe - All OWNYB = 300 NEW WORDING: Since the first of [fill: REF_MO], how much time did you occupy this [fill: timeshare/property]? * Enter quantity and select period

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				<p>on the next screen.</p> <p>Valid values: <0> goto VAC_SEC <1 - 150> goto VAC_OCCY</p> <p>Fill instructions: fill "timeshares" if TIMSHAR from 3B eq 1 else fill "property"</p> <p>Edit: If an entry greater 150, show hard edit "Amount of time occupied cannot exceed the amount of time in the reference period."</p>
03I	VAC_OCCY	VAC_OCCY	NA	<p>NEW QUESTION. This question should be added just after VAC_OCCQ.</p> <p>NEW WORDING:</p> <p>* Enter time period.</p> <ol style="list-style-type: none"> 1. Days 2. Weeks 3. Months 4. Percent 5. Other, specify <p>Valid values <1 - 4, D, R> goto VAC_SEC <5> goto VAC_OTH</p>
031	VAC_OTH	VAC_OTH	NA	<p>NEW QUESTION. This question should be added just after VAC_OCCY.</p> <p>NEW WORDING:</p> <p>*Specify:</p> <p>Valid values <30 character> goto VAC_SEC</p>
03I	VAC_SEC	VAC_SEC	NA	<p>NEW QUESTION. This question should be added just after VAC_OCCQ/VAC_OCCY/VAC_OTH.</p> <p>Universe - If OWNYB = 300 and TIMESHAR (from 3B) = 2</p>

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				<p>NEW WORDING:</p> <p>Since the first of [fill: REF_MO] was this property either rented by someone outside your CU or available to be rented?</p> <p>1. Yes - goto VAC_RNTQ 2. No - goto RNTEQVX</p>
03I	VAC_RNTQ	VAC_RNTQ	NA	<p>NEW QUESTION. This question should be added just after VAC_SEC.</p> <p>Universe - VAC_SEC = 1</p> <p>NEW WORDING:</p> <p>Since the first of [fill: REF_MO], how much time was this property either rented by someone outside your CU or available to be rented?</p> <p>* Enter quantity and select period on the next screen.</p> <p>Valid values: <0> goto RNTEQV2X <1 - 150> goto VAC_RNTY</p> <p>Edit: If an entry greater 150, show hard edit "Amount of time occupied cannot exceed the amount of time in the reference period."</p>
03I	VAC_RNTY	VAC_RNTY	NA	<p>NEW QUESTION. This question should be added just after VAC_RNTQ.</p> <p>NEW WORDING:</p> <p>* Enter time period.</p> <p>1. Days 2. Weeks 3. Months 4. Percent 5. Other, specify</p> <p>Valid values <1 - 4, D, R> goto</p>

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				RNTEQV2X <5> goto VAC Roth
031	VAC Roth	VAC Roth	NA	NEW QUESTION. This question should be added just after VAC_RNTY. NEW WORDING: *Specify: Valid values <30 character> goto RNTEQV2X
03I	RNTEQV2X	RNTEQV2X	NA	Add a new rental equivalence question for vacation homes immediately after VAC_RNTQ/VAC_RNTY/VAC_ROTH. Universe: (OWNYB = 300 and VAC_SEC = 1) NEW WORDING If someone were to rent this home today, how much do you think it would rent for? Valid values <1-999999, D, R> goto RENTPERD
03I	RENTPERD	RENTPERD	NA	Add a new question immediately following RNTEQV2X asking for the time period covered by the timeshare rental. NEW WORDING * Ask if not already stated. What period of time does this rental amount cover? 1. Week 2. Month 3. Quarter 4. Other, specify

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				Valid values <1-3, D, R> goto RENTUTIL; <4> goto RNPEROTH
03I	RNPEROTH	RNPEROTH	NA	Add a new specify field immediately after RENTPERD. NEW WORDING: * Specify: Valid values <30 char> goto RENTUTIL
03I	RENTUTIL	RENTUTIL	NA	Add a new question immediately following RENTPERD/RNPEROTH asking if any utilities are covered by the rental amount. NEW WORDING: Does this amount include utilities? 1. Yes 2. No Valid values <1, 2, D, R> goto PROPVALX
03I	RNTEQVX	RNTEQVX	The current Universe is: (OWNYB = 100, 200 or 300) AND (ASSESSMT = 2, D, R or ASSESSX = D, R or ASSESSCX = 0-99999999, D, R)	Change the Universe statement to: OWNYB = 100 or (OWNYB =300 and VAC_SEC=2) and values are entered in all other necessary fields depending on the type of property.
03I	PROPVALX	PROPVALX	Previously this question was asked in Section 3B.	NEW QUESTION for Section 03I. This question should be added just after RNTEQVX. Universe - If OWNYB = 100 or (OWNYB = 300 and TIMESHAR = 2) and values are entered in all other necessary fields depending on the type of property. Question wording: About how much do you think this property would sell for on today's

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				<p>market?</p> <p>Description - Property value</p> <p>Value/Skip - <0-99999999, D, R> Goto S3I_END</p> <p>Use the same special instructions from Section 03B except remove references to OWNYB eq to 200, 400, and 500.</p>
03I	TIME_RNT	TIME_RNT	NA	<p>NEW QUESTION. Add this question just after PROVALX.</p> <p>Universe - OWNYB = 300 and TIMSHAR (from 3B) =1</p> <p>NEW WORDING:</p> <p>Since the first of [fill: REF_MO], did you rent this timeshare to someone outside your CU?</p> <ol style="list-style-type: none"> 1. Yes 2. No <p>Valid values: <1, 2, D, R> goto RNTREQV3X</p>
03I	RNTEQV3X	RNTEQV3X	NA	<p>NEW QUESTION. Add this new question immediately after TIME_RNT.</p> <p>Universe - OWNYB =300 and TIMESHAR (from 3B) =1</p> <p>NEW WORDING:</p> <p>If you were to rent this timeshare today to someone else, instead of using it yourself, how much would it rent for weekly?</p> <p>Valid values: <1 - 99999, D, R> goto</p> <p>PRPVAL2X</p>
03I	PRPVAL2X	PRPVAL2X	NA	<p>NEW QUESTION. Add this new question immediately after RNTEQV3X.</p>

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
				Universe OWNYB = 300 and TIMESHAR (from 3B) = 1 NEW WORDING: If you were to sell this timeshare, about how much do you think it would sell for on today's market? Value/Skip - <0-99999999, D, R> Goto S3I_END
03I	ANYRENT	ANYRENT	CURRENT WORDING: Since the first of [fill: REF_MON] have [fill:YOU_ANYMEM] rented any houses, apartments, or temporary living quarters NOT used for business or vacation? * Do NOT include college or university regulated housing.	Reword - Change "...NOT used for business..." to "...NOT used entirely for business...: NEW WORDING: Since the first of [fill: REF_MON] have [fill:YOU_ANYMEM] rented any houses, apartments, or temporary living quarters NOT used entirely for business or vacation? *Do NOT include college or university regulated housing.
04A	Various	Various	Currently we ask for the number of phone bills received from each company and then ask detailed questions for each bill.	Beginning in 2007 we stop asking for the number of bills begin asking for any bills from a particular phone company as a group. All of the affected variables are listed below.
04A	TELEBILL	TELEBILL	CURRENT WORDING: Since the first of [fill: REF_MONTH], have [fill YOU_ANYMEM] received any bills for telephone services? Do not include bills for telephones used entirely for business purposes.	Add a references to cellular and Voice Over IP in the screener question. NEW WORDING: Since the first of <MONTH>, have you received any bills for telephone service, including cellular and Voice Over IP? Do no include bills for telephones used entirely for business.
04A	PREVCOMP	PREVCOMP	NA	NEW VARIABLE.

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
				This variable provides a list of previously reported company names for the FR to choose from. Make this or TELCOMP the field you delete a record from. See Attachment D for details.
04A	NOBILLS	NOBILLS	CURRENT WORDING: How many telephone bills were received from [fill: TELCOMP]?	Delete this variable. See attachment D for details.
04A	TELBSNS TELBSNZ	TELBSNS TELBSNZ	These variables currently skip to TELCHGX.	The skips for these variables will change. See Attachment D for details.
04A	TELCHGX1 TELCHGX2 TELCHGX3	TELCHGX1 TELCHGX2 TELCHGX3	NA	These questions will collect the amount of the telephone expenses in each month of the reference period. See Attachment D for details. TELCHGX1: How much were you billed for in [fill: REF_MO]? Do not include any unpaid charges from a previous billing period. TELCHGX2: How much were you billed for in [fill: TWO_MONTH]? Do not include any unpaid charges from a previous billing period. TELCHGX3: How much were you billed for in [fill: LAST_MONTH]? Do not include any unpaid charges from a previous billing period.
04A	BILPERD	BILPERD	NA	This question will be asked when the respondent reports receiving telephone bills but does not report an expenditure in one of the reference months. See Attachment D for details.

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
				<p>What is your usual billing period for this service?</p> <ol style="list-style-type: none"> 1. Month 2. 2 Months 3. Quarter 4. Annual 5. Other
04A	TEL_VOIP	TYPETEL	<p>CURRENT WORDING:</p> <p>What types of telephone services did the bill include?</p> <p>* Enter all that apply, separate with commas.</p> <p>* Read each item on list.</p> <ol style="list-style-type: none"> 1. Residential Service 2. Mobile/Cellular Service 	<p>Add VoIP to TYPETEL checkbox list after Mobile/Cellular Service (it will be the 3rd item listed). See Attachment D for details.</p> <p>NEW WORDING:</p> <p>What types of telephone services did the bill include?</p> <p>* Enter all that apply, separate with commas.</p> <p>*Read each item on list.</p> <ol style="list-style-type: none"> 1. Residential Service 2. Mobile/Cellular Service 3. Voice Over IP
04A	TINTNTX1 TINTNTX2 TINTNTX3	TINTNTX1 TINTNTX2 TINTNTX3	NA	<p>These questions will collected the amount of internet access charges being included in the telephone bill for each month of the reference period. See Attachment D for details.</p> <p>TINTNTX1:</p> <p>How much of the [fill: REF_MO] charges were for internet access?</p> <p>TINTNTX2:</p> <p>How much of the [fill: TWO_MONTH] charges were for internet access?</p> <p>TINTNTX3:</p> <p>How much of the [fill: LAST_MONTH] charges were for internet access?</p>

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
04A	TCABLEX1 TCABLEX2 TCABLEX3	TCABLEX1 TCABLEX2 TCABLEX3	NA	<p>These questions will collected the amount of cable or satellite television charges being included in the telephone bill for each month of the reference period. See Attachment D for details.</p> <p>TCABLEX1: How much of the [fill: REF_MO] charges were for cable or satellite television service?</p> <p>TCABLEX2: How much of the [fill: TWO_MONTH] charges were for cable or satellite television service?</p> <p>TCABLEX3: How much of the [fill: LAST_MONTH] charges were for cable or satellite television service?</p>
04A	NTRTPRX1 NTRTPRX2 NTRTPRX3	NTRTPRX1 NTRTPRX2 NTRTPRX3	NA	<p>These questions will collect the amount of non-telephone related rentals or purchases included in the telephone bill for each month in the reference period. See Attachment D for details.</p> <p>NTRTPRX1: How much of the [fill: REF_MO] charges were for non-telephone related rentals or purchases?</p> <p>NTRTPRX2: How much of the [fill: TWO_MONTH] charges were for non-telephone related rentals or purchases?</p> <p>NTRTPRX3: How much of the [fill: LAST_MONTH] charges were for non-telephone related rentals or</p>

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
				purchases?
04A	TELOTH	TELOTH	See the 2006 specification for details on the current Universe and skip.	The Universe and skips for this variable will change. See Attachment D for details.
04B	PRPYCELL PRPYCLX PRPYCCX	PRPYCELL PRPYCLX PRPYCCX	NA	<p>Add new questions for prepaid cellular after the pre-paid long distance questions (FONCARD, FONCARDX, FONCRDCX).</p> <p>NEW WORDING:</p> <p>Variable - PRPYCELL</p> <p>Since the first of [fill: REF_MO], have you had any expenses for Prepaid Cellular minutes, NOT ALREADY REPORTED?"</p> <p>1. Yes 2. No</p> <p>-----</p> <p>Variable - PRPYCLX</p> <p>What was the total amount paid?</p> <p>Valid values <1-9999,D,R></p> <p>-----</p> <p>Variable – PRPYCCX</p> <p>How much of the total was paid this month?</p> <p>Valid values <0-9999, D, R></p>
04B	FONCARD	FONCARD	<p>Since the first of [fill: REF_MONTH], have [fill: YOU_ANYMEM] purchased any pre-paid telephone cards?</p> <p>1. Yes 2. No</p>	<p>Add "long distance", "/minutes", and "NOT ALREADY REPORTED" to the pre-paid long distance phone card question.</p> <p>NEW WORDING:</p> <p>Since the first of <MONTH>, have you purchased any pre-paid long distance telephone cards/minutes, NOT ALREADY REPORTED?</p>
04C	INTSERV	UTI_ITEM	<p>CURRENT WORDING:</p> <p>Since the first of [fill: REF_MONTH] have [fill: YOU_ANYMEM] had any expenses</p>	<p>Need a separate UTI_ITEM precode and INTSERV item code for Satellite Radio.</p> <p>Add the new item as the second</p>

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Sect	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
			<p>for ...</p> <p>* Read each item on list.</p> <p>1. Cable or satellite TV or satellite radio services?</p> <p>2. Internet connection or an internet service provider?</p> <p>...</p>	<p>item on the list after Cable and Satellite Television. Renumber the remaining precodes.</p> <p>NEW WORDING:</p> <p>Since the first of [fill: REF_MONTH] have [fill: YOU_ANYMEM] had any expenses for ...</p> <p>* Read each item on list.</p> <p>1. Cable or satellite TV services, not already reported?</p> <p>2. Satellite radio services?</p> <p>3. Internet connection or an internet service provider, not already reported?</p> <p>4. ...</p>
	- INTMO	- INTMO	<p>-----</p> <p>---</p> <p>CURRENT WORDING:</p> <p>The FR instruction currently says:</p> <p>* Enter 13 for continuous expense</p>	<p>Store 700 in INTSERV when pre-code 2 is selected.</p> <p>-----</p> <p>NEW WORDING:</p> <p>Change the FR instruction to:</p> <p>* Enter 13 for same amount each month of the reference period.</p>
	- INTCHGX	INTCHGX	<p>-----</p> <p>----</p> <p>CURRENT WORDING:</p> <p>How much was the expense?</p> <p>* Enter the monthly amount if continuous</p>	<p>Also change the description for code 13 to "Same amount each month"</p> <p>-----</p> <p>NEW WORDING:</p> <p>Delete the FR instruction and change the question to a fill--</p> <p>How much was the expense?/What is your monthly expense?</p>
	- INTSERVn	- INTCMB	<p>-----</p> <p>----</p> <p>Currently there are 7 out variables, INTSERV1 to INTSERV7.</p>	<p>Fill the second part of the question when 13 is chosen in INTMO.</p> <p>-----</p> <p>The number of out variables must increase by one becoming INTSERV1 to INTSERV8.</p> <p>Also add the instruction to store 700 when INTCMB includes 2.</p>

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
04D	Various	Various	Currently we ask for the number of utility bills received from each company and then ask detailed questions for each bill.	Beginning in 2007 we stop asking for the number of bills and begin asking for any bills for a particular utility as a group. See Attachment E for details. The affected variables are listed below.
04D	UTC_ITEM	UTC_ITEM	Currently you do not delete a record from this field.	Add 888 as a valid value for this field and make it the field you delete a record from. See Attachment E for details.
04D	WHATPROP	WHATPROP	CURRENT WORDING: Which property was the bill for? [fill: all PROPNUM, PROPDESC from Section 3] [fill: 97. Rented sample unit] [fill: 98. Other rental unit] 99. Property not owned or rented by CU	Renumber the precodes and add a precode for Rented Vacation properties. This will allow the removal of Section 4E. Which property was the bill for? [fill: all PROPNUM, PROPDESC from Section 3] [fill: 40. Rented sample unit] [fill: 41. Other rental unit] 42. Rented vacation property 43. Property not owned or rented by CU
04D	UTLPDESC	UTLPDESC	See the 2006 specification for the current skips for this variable.	Change the skips for this variable. See Attachment E for details.
04D	LASTCOMP	LASTCOMP	NA	NEW VARIABLE. This variable provides a list of previously reported company names for the FR to choose from. Make this or TELCOMP the field you delete a record from. See Attachment E for details.
04D	UTILBUSN HAVEBILL	UTILBUSN HAVEBILL	See the 2006 specification for the current Universes for these variables.	The Universes for these variables will change. See Attachment E for details.
04D	UTLCHGX	UTLCHGX	See the 2006 specification for the current wording and values for this variable.	Delete this variable
04D	UTLCHGX1 UTLCHGX2 UTLCHGX3	UTLCHGX1 UTLCHGX2 UTLCHGX3	NA	These questions will collect the amount of the utility expenses in each month of the reference period. See Attachment E for

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
				<p>details.</p> <p>UTLCHGX1: How much were you billed for in [fill: REF_MO]?</p> <p>UTLCHGX2: How much were you billed for in [fill: TWO_MONTH]?</p> <p>UTLCHGX3: How much were you billed for in [fill: LAST_MONTH]?</p>
04D	BLPERIOD	BLPERIOD	This question is asked for all bills.	This question will only be asked when the respondent reports receiving utility bills but has no expenses in one month of the reference period.
04D	UTILCMB_S	UTILCMB_S	See the 2006 specification for the current Universe for this variable.	The Universe for this variable will change. See Attachment E for details.
04D	MOREBILL	MOREBILL	See the 2006 specification for the current skips for this variable.	The skips for this variable will change. See Attachment E for details.
04E	Various	Various	This section collects utility expenditures for rented vacation properties.	Remove this section from the instrument. Add a property code for Rented Vacation properties to Section 4D, Utilities.
05	CRMCODEA 160	CRB_ITEM 6	<p>CURRENT WORDING for pre-code 6:</p> <p>6. Building outdoor patios, walks, fences, or other enclosures, driveways, or permanent swimming pools</p>	<p>Add hot tubs to CRB_ITEM 6 (CRMCODEA = 160)</p> <p>NEW WORDING for pre-code 6:</p> <p>6. Building outdoor patios, walks, fences, or other enclosures, driveways, permanent swimming pools, or hot tubs</p>
05	CONTRACT	CONTRACT	<p>CURRENT WORDING:</p> <p>Did you do all the work yourself or did you pay someone or contract with a builder to do all or part of the work?</p> <p>1. Self Only</p>	<p>CONTRACT - Add another precode for both do-it-yourself and contracted work.</p> <p>NEW WORDING:</p> <p>Did you do all the work yourself or did you pay someone or contract</p>

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
			2. Paid or contracted with someone else	with a builder to do all or part of the work? 1. Self Only 2. Paid or contracted with someone else 3. Both If Both is selected, follow the same skip as pr-code 2.
05	APPCDEn 140 150	APP_SCR 5 6	CURRENT PRECODES: 5. Refrigerator 6. Home freezer	Change pre-code 5 to "Refrigerator or home freezer"; delete pre-code 6 and renumber all remaining pre-codes. Code 140 will be stored in APPCDEn when "Refrigerator or home freezer" is selected.
05	APPCDEn 100 110 130	APP_SCR 1 2 4	CURRENT PRE-CODES: 1. Electric stove, range or oven 2. Gas stove, range or oven 4. Other stove, range or oven	Change pre-code 1 to "Cooking stove, range, or oven"; delete pre-codes 2 and 4 and renumber all remaining pre-codes. Code 100 will be stored in APPCDEn when "Cooking stove, range, or oven" is selected.
06A	MAJPURX	MAJ_AMOUNT	CURRENT WORDING What was the purchase price after any trade-in allowance?	Remove "after any trade-in allowance" from the purchase price question. NEW WORDING: What was the purchase price?
06A	INSTALL	INSTALL	CURRENT WORDING: Were there any extra charges for installation? 1. Yes 2. No	Add "or delivery" to the prompt. NEW WORDING: Were there any extra charges for installation or delivery? * Include charges for disposal of old appliances. 1. Yes 2. No
06A	MAJAPPLY 140 150	APA_ITEM 6 7	CURRENT PRE-CODES 6. Refrigerator 7. Home-freezer	Change pre-code 6 to "Refrigerator or home freezer"; delete pre-code 7 and renumber all remaining pre-codes. Code 140 will be stored in MAJAPPY when 6 is selected.

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
06A	MAJAPPLY 100 110 130	APA_ITEM 2 3 4	CURRENT PRE-CODES: 2. Electric stove, range or oven 3. Gas stove, range or oven 4. Other stove, range or oven	Change pre-code 2 to "Cooking stove, range, or oven"; delete pre-codes 3 and 4 and renumber all remaining pre-codes. Code 100 will be stored in MAJAPPLY when "Cooking stove, range, or oven" is selected.
06B	MINAPPLY 390 670	APB_ITEM 22 23	CURRENT PRE-CODES: 22. VCRs, video cameras, DVD players, camcorders 23. Satellite dishes	Change the pre-code descriptions. 22. DVD Players,VCRs, DVRs, or video cameras 23 - Satellite dishes, receivers, or accessories
06B	MINAPPLY 450 460	APB_ITEM 14 15	CURRENT PRE-CODES: 14. Pianos, organs, or keyboards 15. Other musical instruments, supplies, or accessories	Change the wording of pre-code 14 to "Musical instruments, supplies, and accessories"; delete pre-code 15 and renumber the remaining pre-codes. Store code 460 in MINAPPLY when "Musical instruments, supplies, and accessories" is selected.
06B	MINAPPY	APB_ITEM	NA	Create a pre-code for "Video and computer game hardware, software, Gameboys, and accessories." (Previously collected in Section 19A.) Put the pre-code after pre-code 10, "Computer software and accessories or non-business use." Store 700 in MINAPPLY when this pre-code is selected.
06B	INSTLSCR INSTLLEX	INSTLSCR INSTLLEX	NA	Collect expenses for Home Theater and Computer installation. In Section 6B, add questions for whether installation charges when pre-code 9, 21, 23, 27, or 28 is selected. If any of these items are included in a combined code, then activate the installation questions. Add the questions immediately after the expenditure amount for the item. NEW WORDING: Variable INSTLSCR - Were there any additional charges

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
				for installation, set-up, or delivery? 1. Yes 2. No ----- Variable INSTLLEX - How much? Valid values <1-99999, D, R> Range values.....to be provided
07	S7_INTRO	S7_INTRO	CURRENT WORDING: Now I will ask about expenditures for household equipment maintenance or repairs and service contracts.	In the Section 7 Intro replace "equipment" with "items" NEW WORDING: Now I will ask about expenditures for household item maintenance or repairs and service contracts.
08A	FURNPURY 141	FRA_ITEM 14	CURRENT WORDING for pre-code 14: 14. Outdoor equipment	Change the wording of pre-code 14. NEW WORDING: 14. Barbeque grills or outdoor decorative items
08A	FURNPURY 103	FRA_ITEM 4	CURRENT WORDING for pre-code 4: 4. Modular wall units, shelves or cabinets?	Change the wording of pre-code 4: NEW WORDING: 4. Wall units, shelves or cabinets?
08A	FURNPURY 170	FRA_ITEM 16	CURRENT PRE-CODES: 16. Clocks?	Clocks does not need its own code. Clocks will now be reported with pre-code 18. Other Household Decorative Items. An Info Book change will be needed. Delete pre-code 16 and renumber the remaining pre-codes.
08A	FURNPURY 180	FRA_ITEM 19	CURRENT WORDING for pre-code 19: 19. Storage Items?	Change the wording of pre-code 19. NEW WORDING: 19. Closet Storage Items
09A	CLOTHYA 150 160	CLA_ITEM 6 7	CURRENT PRE-CODES: 6. Pants, slacks, or jeans 7. Shorts or short sets (Exclude	Change the wording of pre-code 6 to "Pants, jeans, or shorts"; delete pre-code 7 and renumber the remaining pre-codes.

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
			athletic shorts)	When "Pants, jeans, or shorts" is selected store 150 in CLOTHYA NEW WORDING for pre-code 6: 6. Pants, jeans, or shorts
09A	CLOTHYA 240	CLA_ITEM 15	CURRENT WORDING for pre-code 15: 15. Active sportswear?	Reword the pre-code. NEW WORDING for pre-code 15. 15. Swimsuits or warm-up or ski suits
09C	CLOTHYD 490	CLD_ITEM 5	CURRENT WORDING for pre-code 5: 5. Clothing storage	Reword the pre-code. NEW WORDING for pre-code 5: 5. Clothing Storage Outside the Home
10	NUMPAY PAYEXPX PAYTIME	NUMPAY PAYEXPX PAYTIME	What was the number of payments contracted for? What is the amount of each payment? What period is covered by each payment? 1. Week 2. 2 weeks 3. Month 4. Quarter 5. Semiannually 6. Annually 7. One time payment 8. Other	When NUMPAY >= 12 store 3 in PAYTIME Add a fill to PAYEXPX. When NUMPAY >= 12, fill the second question. NEW WORDING: [fill: What is the amount of each payment?/ What is your monthly payment amount?] Do not ask PAYTIME when NUMPAY >= 12.
10	ANYHAVE	ANYHAVE	CURRENT WORDING:	Change the wording of ANYHAVE

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
	LVIHAVE	LVIHAVE	Do you still have this vehicle? Do you still have the [fill: 8500.MODELYR] [fill: 8500.MKMD_SCR/8500.OTHMODEL]?	to: Are you still leasing this vehicle? Change the wording of LVIHAVE to: Are you still leasing the [fill: 8500.MODELYR] [fill: 8500.MKMD_SCR/8500.OTHMODEL]? Add "FR Note: If the vehicle was purchased at the end of the lease, collect the new vehicle in Section 11" to both ANYHAVE and LVIHAVE.
10	RENTCODE 120	RLV_ITEM 3	CURRENT WORDING for pre-code 3: 3. Motorized camper-coach	Change the wording of the pre-code. NEW WORDING for pre-code 3: 3. Motor home
11	VEHICYB VEHICYC 120	OVB_ITEM 3	CURRENT WORDING for pre-code 3: 3. Motorized camper-coach	Change the wording of the pre-code. NEW WORDING for pre-code 3: 3. Motor home
11	NETPURX	VEHPURX	CURRENT WORDING: What was the amount paid for the vehicle after [Fill: trade-in allowance,] rebate, and discount?	Add "FR Note: Include destination fee in the price."
11	FIN_INST	FIN_INST	CURRENT WORDING: What was the source of the credit? 1. Auto Dealer 2. Finance company 3. Bank 4. Credit Union 5. Insurance Company 6. Individual 7. Other - specify	Delete this question.
11	FINOTH	FINOTH	CURRENT WORDING:	Delete this question

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
			* Specify:	
11	VEHEQTLN	VEHEQTLN	CURRENT WORDING: Was this a home equity loan?	Reword the question: NEW WORDING: Was the source of credit a Home Equity Loan?
11	PMT1MO	PMT1MO	CURRENT WORDING: In what month was or will the first payment be made?	Move PMT1MO after PMT1YR
11	VEHQPMT	VEHQPMT	CURRENT WORDING: What was the number of payments contracted for?	Ask for the length of the payment contract in months. NEW WORDING: For how many months was the payment contract?
	----- - PAYMENTX	----- - PAYMENTX	----- ---- CURRENT WORDING: What is the amount of each payment?	----- -- NEW WORDING: What is your monthly payment amount?
	----- - PMTPERD	----- - PMTPERD	----- - CURRENT WORDING: What period is covered by each payment? 1. Week 2. 2 weeks 3. Month 4. Quarter 5. Semiannually 6. Annually 7. Other specify	----- -- The range edits can remain the same. Delete this variable.
	----- - PAY110TH	----- - PAY110TH	----- CURRENT WORDING: * Specify:	----- -- Delete this variable.
11	EXTRACHG EXTRCHGX	EXTRACHG EXTRCHGX	Does the payment include any charges other than principal and interest such as an extended warranty, auto insurance, or	Delete EXTRACHG and EXTRCHGX

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
			credit life insurance? How much of the payment is for these extra charges?	
11	VFINSTAT	VFINSTAT	CURRENT WORDING: On the first of [fill: REF_MONTH], were all loans on the vehicle paid off or were there any remaining payments to be made? 1. Paid off 2. Remaining payments	Change the question wording: NEW WORDING: On the first of [fill: REF_MONTH] were there remaining loan payments? 1. Yes 2. No <1, D, R> [goto TRADE] <2> [If VEHPURMO + VEHPURYR is prior to 3 months ago AND DISPOSED is 1, goto VEHDISP] [If VEHPURMO + VEHPURYR is prior to 3 months ago AND DISPOSED does NOT equal 1, goto ANYOTHR] [else, goto TRADE]
12C	VOPBSNS VOPBSNSX	VOPBSNS VOPBSNSX	Was any of the AVERAGE MONTHLY cost counted as a business expense? 1. Yes 2. No How much of the \$XX was counted as a business expense?	Delete VOPBSNS and VOPBSNSX.
12C	VOPBSPER	VOPBSPER	na	Replace VOPBSNS and VOPBSNSX with this variable. NEW WORDING: What percentage of the AVERAGE MONTHLY cost was counted as a business expense? Valid values - <0-100, D, R> Add a soft edit to verify an entry of 100.
12C	VOPTOW	VOPTOW	CURRENT WORDING:	Reword VOPTOW - delete "not including contracted or pre-paid"

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
			Towing charges, not including contracted or pre-paid towing charges?	<p>towing charges" and add "...not already reported."</p> <p>Move VOPTOW question to ask after automobile service clubs (VOPAUTO) question.</p> <p>NEW WORDING:</p> <p>Towing charges, not already reported?</p>
12C	VOPFLUID	VOPFLUID	<p>CURRENT WORDING:</p> <p>Since the first of MONTH, have you or any members of you CU purchased any antifreeze, brake fluid, transmission fluid, or additives, except if purchased with a tune-up? Do not include purchases for vehicles used entirely for business.</p>	<p>NEW WORDING:</p> <p>Since the first of [fill: REF_MO], have [fill: YOU_ANYMEM] purchased any antifreeze, brake fluid, transmission fluid, or additives, except if purchased with a tune-up?</p>
12C	VOPOIL	VOPOIL	<p>CURRENT WORDING:</p> <p>Since the first of MONTH, have you or any members of your CU purchased any oil for operating vehicles, other than oil included with the purchase of an oil change? Do not include purchases for vehicles used entirely for business.</p>	<p>NEW WORDING:</p> <p>Since the first of [fill: REF_MO], have [fill: YOU_ANYMEM] purchased any oil for operating vehicles?</p>
13	POLICYYB	INB_ITEM	<p>CURRENT WORDING for pre-code 4:</p> <p>4. Tenants' insurance which protects your home, furniture, personal effects or other property against fire, flood, theft, loss or damage?</p>	<p>Change "Tenants' Insurance" to "Renters' Insurance"</p> <p>NEW WORDING -</p> <p>4. Renters' insurance which protects your home, furniture, personal belongings or other property against fire, flood, theft, loss or damage?</p>
13B	PREMPERD	PREMPERD	<p>CURRENT WORDING:</p> <p>How often are premiums on this policy paid?</p>	<p>Delete this question.</p>

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
			1. Weekly 2. Biweekly 3. Monthly - directly 4. Monthly - in mortgage payment	
14C	Various	Various	NA	Add questions to capture any changes in premium payment amounts for Medicare Prescription Drug Plans. (See Attachment G for details.)
15	MEDPGFTC MEDRGFTC	MEDPWHO MEDRWHO	CURRENT WORDING: Who [Fill: was/were] the [Fill: description] for? [Fill: "active" CU members] 55. Non-CU member	Change the question to ask if the medical care was for someone inside the CU or someone outside of the CU. Change the instrument variable names from MEDPWHO/MEDRWHO to MEDPGFTC/MEDRGFTC. The separate out variable will no longer be necessary. NEW WORDING: Was the [Fill: description] for a member of CU or someone outside of your CU?
----- ----- 15A	----- - MEDPMTMO	----- - MEDPMTMO	----- ----- CURRENT WORDING: The FR instruction currently says: * Enter 13 for continuous expense	----- 1. CU member 2. Non-CU member ----- - NEW WORDING: Change the FR instruction to: * Enter 13 for same amount each month of the reference period. Also change the description for code 13 to "Same amount each month"
15A 15B	MEDPCARY MEDRCARY 530	MDB_ITEM MDC_ITEM 9	CURRENT WORDING for pre-code 9: 9. Other medical care	NEW WORDING for pre-code 9: 9. Other medical care and services
15A 15B	MEDPCARY MEDRCARY 410	MDB_ITEM MDC_ITEM 5	CURRENT WORDING for pre-code 5:	In the Information Book add the following instruction for pre-code 5:

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			5. Services by medical professionals other than physicians	Include services provided both inside and outside the home.
15B	S15B_INTRO	S15B_INTRO	<p>CURRENT WORDING:</p> <p>Now I am going to ask you some questions about your reimbursements.</p> <p>By reimbursements I mean any money received for any members of your CU from an insurance company, medical care provider or non-CU member for medical expenses which you previously paid or will pay. Do not include reimbursements from a flexible spending account.</p>	<p>Add "Medical Savings Account" to the do not include list.</p> <p>NEW WORDING:</p> <p>Now I am going to ask you some questions about your reimbursements.</p> <p>By reimbursements I mean any money received for any members of your CU from an insurance company, medical care provider or non-CU member for medical expenses which you previously paid or will pay. Do not include reimbursements from a flexible spending account or Medical Savings Account.</p>
16	na ----- - EDSCHL_A	EDA_INTRO ----- EDSCHL_A	<p>CURRENT WORDING:</p> <p>Now I am going to ask about education expenses. Please include any direct payments made for any members of your CU or for anyone outside your CU and any payments you made online or had automatically deducted.</p> <p>-----</p> <p>-----</p> <p>CURRENT WORDING:</p> <p>* Ask if not apparent.</p> <p>What kind of school was it?</p> <ol style="list-style-type: none"> 1. College or university 2. Elementary or high school 3. Child day care center 4. Nursery school or preschool 5. Other school 	<p>NEW WORDING:</p> <p>Now I am going to ask about education expenses. Please include any direct payments made for any members of your CU or for anyone outside your CU and any payments you made online or had automatically deducted.</p> <p>Do NOT include payments made on student loans.</p> <p>-----</p> <p>--</p> <p>Add "Vocational or Technical School" after College or university.</p> <p>NEW WORDING:</p> <p>* Ask if not apparent.</p> <p>What kind of school was it?</p> <ol style="list-style-type: none"> 1. College or university 2. Elementary or high school 3. Child day care center 4. Nursery school or preschool

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
	----- EDMONTHA	----- - EDMONTHA	----- ---- CURRENT WORDING: The FR instruction currently says: * Enter 13 for continuous expense	5. Vocational or technical school 6. Other school ----- NEW WORDING: Change the FR instruction to: * Enter 13 for same amount each month of the reference period. Also change the description for code 13 to "Same amount each month"
17A	S17CODEA 910	SUB_ITEM 11	CURRENT WORDING for pre-code 11: 11. Global positioning services, or GPS, such as Onstar	GPS Services current question wording should be changed. NEW WORDING for pre-code 11. 11. Services that use Global Positioning System or GPS, such as OnStar, not already reported.
17A	S17CODEA New 950 ----- - SUBDESC	SUB_ITEM ----- - SUBDESC	NA ----- ---- CURRENT FR INSTRUCTION: * Enter name such as [fill: "Jaycess", "Kent Swim and Country Club", "Amoco Motor Club", "or " Sam's Club"./ "Daily News", "Reebok", "Columbia Record club", "Book of the Month Club."]	A new pre-code for "Vacation clubs" needs to be added. It should be inserted after pre-code 7, "Health clubs, fitness centers, ...". When the new "Vacation clubs" pre-code is selected 950 will be stored in S17CODEA. Renumber the remaining pre- codes. ----- -- Delete the FR instructions.
18	PVCARY PVLEASY PVOTHERY	TRPTRNS	CURRENT PRE-CODES: 13. Car owned by CU (private) 14. Vehicle leased by CU (private) 15. Other vehicle owned by CU (private)	Combine 13-15 and reword to "Privately owned automobiles or other vehicles". NEW WORDING: 13. Automobiles or other vehicles privately owned or leased by CU

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
				Renumber remaining pre-codes
18B C	RTCARY	RTCARY	CURRENT WORDING: How much did [fill: YOU_ANYMEM] spend for rented cars or jeeps, not including gas [fill: YOU_ANYMEM] bought [fill:other than what the package deal covered]?	Instead of asking for "cars or jeeps" ask for "automobiles". NEW WORDING: How much did [fill: YOU_ANYMEM] spend for rented automobiles [fill:other than what the package deal covered]?, not including gas [fill: YOU_ANYMEM] bought
18B C	GASOILX	ANYGAS	CURRENT WORDING: While on the trip did [fill:YOU_ANYMEM] stop to buy any gasoline, oil, diesel fuel, or any other fuels?	Delete "oil" from question wording. NEW WORDING: While on the trip did [fill:YOU_ANYMEM] stop to buy any gasoline, diesel fuel, or any other fuels?
18B C	ANYTOLL	ANYTOLL	CURRENT WORDING: While on the trip, did [fill: YOU_ANYMEM] spend anything for tolls?	Add "not already reported" NEW WORDING: While on the trip, did [fill: YOU_ANYMEM] spend anything for tolls, not already reported?
18B C	LODGING	LODGING	CURRENT WORDING: Did [fill: YOU_ANYMEM] spend anything for hotels, motels, cottages, trailer camps, or other lodging [fill: not counting what the package deal covered]?	Add an additional fill, " Do not include expenses previously reported for vacation clubs." after the question when "Vacation clubs" are reported in Section 17A. "Vacation clubs" is a new item to Section 17A and is expected to be pre-code 8 in that section. NEW WORDING: Did [fill: YOU_ANYMEM] spend anything for hotels, motels, cottages, trailer camps, or other lodging [fill: not counting what the package deal covered]? [fill: Do not include expenses previously reported for vacation clubs.]
18B C	FOODOUTS LODGOUTS	FOODOUTS LODGOUTS	CURRENT WORDING: Did these expenses include anything for...	Delete FOODOUTS, LODGOUTS, TRANOUTS, ELSEOUTS.

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	TRANOUTS ELSEOUTS	TRANOUTS ELSEOUTS	...Food and beverages? ...Lodging? ...Transportation? ...Anything else?	
19A	MISCCODE 190 220	MIS_ITEM 14 15	All pre-codes in Section 19A are on one screen	<p>Create a separate screen for Child Care - add screener in S19A before child care pre-codes 14 and 15. These will be the only two codes on this screen.</p> <p>SCREENER WORDING:</p> <p>Have [fill: YOU_ANYMEM] had expenses for babysitting, nanny services or other child care?</p> <p>* If YES - Read each item on list</p> <p>14. Babysitting, nanny services, or other child care in your home 15. Babysitting, nanny services, or other child care in someone ELSE'S home 95. Continue</p> <p>See Attachment F for details on the new pre-code groupings.</p>
19A	MISCCODE 130	MIS_ITEM 3	NA	<p>Catered affairs, parties or events" - add screener in S19 before catered events questions (party supply rental, live entertainment hire & catered affairs food & beverage)</p> <p>Use MISCCODE 410 for live entertainment.</p> <p>Use MISCCODE 420 for rental of party supplies.</p> <p>Allow all catered affairs questions to be combined.</p> <p>See Attachment F for details on the new pre-code groupings.</p>
19A	MISCCODE	MISCCODE	NA	Video and computer game hardware, software, Gameboys,

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	290	290		<p>and accessories - move from S19 to S6, after precode 10, Computer software and accessories for non-business use.</p> <p>See Attachment F for details on the new pre-code groupings.</p>
19A	MISCMO	MISCMO	<p>CURRENT WORDING:</p> <p>The FR instruction currently says:</p> <p>* Enter 13 for continuous expense</p>	<p>NEW WORDING:</p> <p>Change the FR instruction to:</p> <p>* Enter 13 for same amount each month of the reference period.</p> <p>Also change the description for code 13 to "Same amount each month"</p>
19B	CONTMO	CONTMO	<p>CURRENT WORDING:</p> <p>The FR instruction currently says:</p> <p>* Enter 13 for continuous [fill: payment/contribution]</p>	<p>NEW WORDING:</p> <p>Change the FR instruction to:</p> <p>* Enter 13 for same [fill: payment/contribution each month of the reference period.</p> <p>Also change the description for code 13 to "Same amount each month"</p>
20	GROCWEKX	GROCWEKX	<p>CURRENT WORDING:</p> <p>Now I am going to ask you about expenses for food, beverages and other items.</p> <p>Since the first of [Fill: REF_MONTH] what has been your usual WEEKLY expense at the grocery store or supermarket?</p> <p>* Include grocery home delivery service fees.</p>	<p>Add a prompt to think of expenses in the reference period at the beginning of the section instead of stating it for each question. Add to the existing FR Note in Sect 20 GROCWEKX. Drop the term "grocery store" and "supermarket" and instead ask about "grocery shopping" since there are now Super Stores, like Wal-Mart that sell groceries.</p> <p>NEW WORDING:</p> <p>Now I am going to ask you about expenses for food, beverages and other items [fill: YOU_YRCU] [fill: have/has] purchased since the first of [fill: REF_MONTH].</p>

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
				<p>What has been [fill: YR_YRCU] usual WEEKLY expense for grocery shopping?</p> <p>*Include grocery home delivery service fees and drinking water delivery fees.</p>
20A	OTHSTOR	OTHSTOR	<p>CURRENT WORDING:</p> <p>Have [fill: YOU_ANYMEM] purchased any food or nonalcoholic beverages from places other than grocery stores, such as convenience stores, specialty stores, bakeries, home delivery, vegetable stands, or farmer's markets?</p>	<p>NEW WORDING:</p> <p>Other than your regular grocery shopping already reported, have [fill: YOU_ANYMEM] purchased any food or nonalcoholic beverages from places such as grocery stores, convenience stores, specialty stores, home delivery, or farmer's markets?</p>
20A	DINEOUT	DINEOUT	<p>Have [fill: YOU_ANYMEM] purchased meals, snacks or fast food from restaurants, cafeterias, carryouts, street vendors or other such places? [fill: (Do not include meals purchased at school.)]</p> <p>1. Yes</p> <p>2. No</p>	<p>Delete the screener for food away from home DINEOUT.</p>
20A	DINE_MOX NEW: DINE_WKX	DINE_MOX NEW: DINE_WKX	<p>What was the usual MONTHLY expense for these purchases?</p>	<p>Move food away from home to follow OSTORWKC and change the period to WEEKLY.</p> <p>Reword to account for deletion of DINEOUT screener:</p> <p>What has been [fill: YR_YRCU] usual WEEKLY expense for meals or snacks from restaurants, fast food places, cafeterias, carryouts or other such places? [fill: (Do not include meals purchased at school.)]</p>
20A	ALCOHOL ALC_OUT	ALCOHOL ALC_OUT	<p>Since the first of [fill: REF_MONTH] have [fill: YOU_ANYMEM] purchased any beer, wine, or other alcoholic beverages to be served at home?</p>	<p>Have one screener for alcohol at home or away from home. Call the variable ALCOHOL and delete ALC_OUT.</p> <p>NEW WORDING:</p>

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Section	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
			<p>1. Yes</p> <p>2. No</p> <p>Have [fill: YOU_ANYMEM] purchased any beer, wine, or other alcoholic beverages in restaurants, bars, clubs, or at other recreational events?</p> <p>1. Yes</p> <p>2. No</p>	<p>Since the first of [fill: REF_MONTH], have [fill: YOU_ANYMEM] purchased alcohol, including beer and wine?</p> <p>1. Yes - goto ALC_HOMX 2. No - goto FREEFOOD</p>
20A	BRWINMOX OTHALMOX New: ALC_HOMX	BRWINMOX OTHALMOX New: ALC_HOMX	<p>What was your usual MONTHLY expense for beer and wine?</p> <p>What was the usual MONTHLY expense for other alcoholic beverages?</p>	<p>Combine beer/wine and other alcohol questions. Reword alcohol for home to account for new screener question. Call the new variable ALC_HOMX.</p> <p>NEW WORDING:</p> <p>What has been [fill: YR_YRCU] usual MONTHLY expense for alcohol, including beer and wine to be served at home?</p> <p>Valid values: <0-9999, D, R> goto ALC_OUTX</p>
20A	ALC_OUTX	ALC_OUTX	<p>What was the usual MONTHLY expense?</p>	<p>Reword ALC_OUTX to account for new alcohol screener and deletion of alcohol away from home screener.</p> <p>NEW WORDING:</p> <p>What has been [fill: YR_YRCU] usual MONTHLY expense for alcohol, including beer and wine at restaurants, bars and recreational events?</p>
22B				<p>Create a field using data in section 3. If the CU owns the sample unit and has 0 mortgages on the sample unit, set NONEMORT=1</p>

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
	REVSMORT	REVSMORT	na	<p>IF AGE62 = 1 & NONEMORT = 1 THEN ask these questions at the end of section 22B:</p> <p>NEW WORDING:</p> <p>Do [Fill: YOU_YRCU] have a Reverse Mortgage on this home?</p> <p>1. Yes - goto TYPEPAY 2. No - goto 22B_END</p>
	----- - TYPEPAY	----- - TYPEPAY	----- ---- na	<p>----- -- NEW WORDING:</p> <p>You can be paid in several ways from a reverse mortgage. How are you paid from this mortgage?</p> <p>* Mark all that apply, separate with commas.</p> <p>1. Lump Sum - goto TYPEPYX 2. Regular monthly payment - goto TYPEPYX 3. Credit Line account - goto TYPEPYX 4. Other - TYPYOTH</p> <p>Create the following out variables:</p> <p>If TYPEPAY = 1, store 1 in RVSLUMP If TYPEPAY = 2, store 2 in RVSREGMO If TYPEPAY = 3, store 3 in RVSLOC If TYPEPAY = 4, store 4 in RVSOTHPY</p>
	----- - TYPYOTH	----- - TYPYOTH	----- ---- na	<p>----- -- NEW WORDING;</p>
	----- - TYPEPYX	----- - TYPEPYX	----- ---- na	<p>----- * Specify: ----- -- NEW WORDING:</p>

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Section	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
				Since the first of [fill: REF_MONTH], how much have you received from this mortgage?
24	CUINCOME	CUINCOME	<p>Which category represents your TOTAL income during the past 12 months? This includes money from jobs, net income from business, farm or rent; pensions, dividends, interest, social security payments; and any other money income you received.</p> <p>1.Loss</p> <p>2.Under \$3,000</p> <p>3.\$3000-5,999</p> <p>... 14. \$75,000 +</p>	Delete this question, which comprises all of Section 24. The question and section is out of date and is not used in income imputation.
Control Card	AGE62	NA	NA	Create a field based on the AGE in the member roster. If the AGE of the reference person , spouse, or unmarried partner is greater than or equal to 62 then AGE62 = 1
COV	BUILD_A	BUILD_A	NA	<p>NEW QUESTION. We are adding this question to improve the imputation of tenure for Type A non-interviews by BLS and SORAR.</p> <p>UNIVERSE: IF TENURE (from the COV spec) is other than a 1 or 2</p> <p>This question follows TENURE from COV</p> <p>Which best describes this building?</p> <ol style="list-style-type: none"> 1. Single family detached 2. Townhouse - inner unit 3. End row or end townhouse 4. Duplex 5. 3-plex or 4-plex 6. Garden 7. High-rise

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Sect	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
				<p>8. Apartment or flat 9. Mobile home or trailer 10. College dormitory</p> <p>Variable Name BUILD_A</p> <p>Description Building Type A</p>
CC	CE_INTRO	CE_INTRO	<p>"Most questions that I will be asking refer to a specific time period..."</p>	<p>Add a generic statement to CE_INTRO (before reference period definition) to inform respondents that we ask all questions to all respondents, even if the questions may not apply to that particular respondent.</p> <p>"As we start, please understand that we ask the same questions of everybody we talk to. I realize some of these questions may not apply to your CU."</p> <p>"Most questions that I will be asking refer to a specific time period..."</p>
Bac k	INFOBOOK	INFOBOOK	<p>* Was the information booklet used during the interview?</p> <p>1. Yes 2. No</p> <p><u>Value/Skip Instructions</u> <1,2> [goto LANGUAGE]</p>	<p>* In this interview, did the respondent use the information booklet?</p> <p>If reading the book to the respondent, respond no.</p> <p>1. Yes 2. No</p> <p><u>Value/Skip Instructions</u> <1,2> [goto LANGUAGE]</p>
Bac k	USERECS	USERECS	<p>* In answering questions about expenses, did the respondent consult bills, receipts, check stubs, expense books, tax returns, or other records?</p> <p>1. Always 2. Almost always 3. Mostly 4. Occasionally 5. Almost never 6. Never</p>	<p>* In this interview, how often did the respondent consult records?</p> <p>1. Always or almost always (90% of the time or more) 2. Most of the time (50% to 89% of the time) 3. Occasionally (10% to 49% of the time) 4. Never or almost never (less than 10% of the time)</p>

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Sec t	BLS Variable	Instrument Variable	Current CEQ Instrument Wording	2007 CHANGE
			<u>Value/Skip Instructions</u> <1-5> [goto TYPEREC] <6> [goto HOMEFILE]	<u>Value/Skip Instructions</u> <1-3> [goto TYPEREC] <4> [goto HOMEFILE]

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These questions begin with the MCHANGE question in Section 3A1 and just before the questions about home equity lines of credit or whether the CU has acquired any new mortgages.

If only one mortgage or lump sum home equity loan was reported for the property:

Since your last interview, have there been any changes to your [fill: mortgage/lump sum home equity loan], such as refinancing, a change in property taxes or insurance, or ending the loan?

If more than one mortgage or lump sum home equity loan was reported for the property:

For the [fill: mortgage/lump sum home equity loan] in which you reported a payment of [fill: of 8500.MRTPMTX/'blank'], since your last interview, have there been any changes to that [fill: mortgage/lump sum home equity loan], such as refinancing, a change in property taxes or insurance, or ending the loan?

1. Yes - goto MORTCHNG
2. No - if 8500.FIXEDRTE eq 1 goto next loan else goto ADDMORT
if 8500.FIXEDRTE ne 1 goto PYMTJX1

D, R - if 8500.FIXEDRTE eq 1 goto next loan else goto ADDMORT
if 8500.FIXEDRTE ne 1 goto PYMTJX1

<u>>Variable Name</u>	Description
MCHANGE	Payment change

What was the reason for the change in your [fill: mortgage/lump sum home equity loan] for your [fill: 8500.PROPDESC]?

1. Change in escrow payment (include changes in property taxes, insurance) - goto PYRINIJ
2. Change in interest rate - goto NEWMRRTJ

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3. Paid off - goto MORTCHMO
4. Change in amount of the graduated payment for a graduated payment [fill: mortgage/lump sum home equity loan] - goto PYRINIJ
5. [Fill: Mortgage/Lump sum home equity loan] renegotiated (rollover or renegotiable [Fill: mortgage/lump sum home equity loan]) - goto ORWHAT
6. Refinanced [fill: mortgage/lump sum home equity loan] (this includes changing the term of the [fill: mortgage/lump sum home equity loan]) - goto ORWHAT
7. Other reasons - goto ORWHAT
8. More than one of the above - goto ORWHAT

D, R - goto ORWHAT

<u>>Variable Name</u> MORTCHNG	Description	Change reason
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Is this a 30 year [Fill: mortgage/lump sum home equity loan], a 15 year [Fill: mortgage/lump sum home equity loan], or something else?

1. 30-year - goto FIXEDRTJ
2. 15-year - goto FIXEDRTJ
3. Something else - goto MRTTERMJ

D, R - goto FIXEDRTJ

<u>>Variable Name</u> ORWHAT	Description	Mortgage Term
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* Enter number of years.

Valid values <1 - 50, D, R> goto FIXEDRTJ

<u>>Variable Name</u> MRTTERMJ	Description	Specify years
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Is this a fixed rate [Fill: mortgage/lump sum home equity loan]?

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1. Yes - goto ORGMRTJX
2. No - goto PAYTYPJ

<u>>Variable Name</u>	FIXEDRTJ	Description	Fixed Rate
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There are many different kinds of [Fill: mortgage/lump sum home equity loan]s. Which of these comes closest to [Fill: YRS_YRCS]?

- * Read each item on list.
- * Mark all that apply, separate with commas.

1. Variable or adjustable rate of interest (ARM)
2. Interest only
3. Something else

If precode 3 is included goto PAYTOTHJ then ORGMRTJX, else goto ORGMRTJX

<u>>Variable Name</u>	PAYTYPJ	Description	Loan Type
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* Specify:

Valid value <30 characters> goto ORGMRTJX

>Variable Name	DESCRIPTION	Specify
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What was the amount of the [fill: mortgage/lump sum home equity loan] when [fill: YOU_YRCU] first obtained it, not including any interest?

Valid values <1 - 99999999, D, R> goto NEWMRRTJ

>Variable Name	DESCRIPTION	Principal amount
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What is the current interest rate for this [Fill: mortgage/lump sum home equity loan]?

* Enter percent including decimal

Valid values <00.000 - 99.999, D, R> goto PYRINIJ

>Variable Name	DESCRIPTION	Current Interest Rate
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On [fill: YR_YRCUS] last payment, which of these things were included?

* Enter all that apply, separate with commas

1. Principal - if FIXEDRTJ eq 2, D, or R goto MORTCHMO, else goto MRTPMTJX

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2. Interest - if FIXEDRTJ eq 2, D, or R goto MORTCHMO, else goto MRTPMTJX
 3. Property taxes - if FIXEDRTJ eq 2, D, or R goto MORTCHMO, else goto MRTPMTJX
 4. Property insurance - if FIXEDRTJ eq 2, D, or R goto MORTCHMO, else goto MRTPMTJX
 5. Mortgage guarantee insurance - if FIXEDRTJ eq 2, D, or R goto MORTCHMO, else goto MRTPMTJX
 6. Any other payments - specify - goto PYJOTH
77. Don't know - if FIXEDRTJ eq 2, D, or R goto MORTCHMO

>Variable Name PRYINIJ	Description	Included in Payment
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* Specify:

Valid value <30 characters> goto if FIXEDRTJ eq 2, D, or R goto MORTCHMO, else goto MRTPMTJX

>Variable Name PYJOTH	Description	Specify
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This question is only asked for Fixed Rate mortgages – FIXEDRTJ = 1.

How much is [fill: YR_YRCUS] [Fill: mortgage/lump sum home equity loan] payment per month?

Valid values <1 - 99999999, D, R > [if any codes 3 to 6 selected in PYRINIJ goto PRININJX, else goto MORTCHMO]

>Variable Name MRTPMTJX	Description	Total Loan Payment
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This question is only asked for Fixed Rate mortgages – FIXEDRTJ = 1.

How much of that amount is for [fill: principal/interest/principal and interest]?

Fill based on whether codes 1 and 2 are both selected in PYRINIJ

Valid values <0 - 99999999, D, R> goto MORCHMO

<u>>Variable Name</u>	PRININJX	Description	Principal/interest amount
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In what month did [Fill: you pay off your [Fill: mortgage/lump sum home equity loan]/your [Fill: mortgage/lump sum home equity loan] change]?

Valid values <REF_MONTH - CUR_MONTH, D, R> - if FIXEDRTJ eq 2, D, or R goto PYMTJX1 else goto next loan else goto ADDMORT

<u>>Variable Name</u>	MORTCHMO	Description	Month payment changed
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This question is only asked for non-Fixed Rate mortgages – FIXEDRTJ = 2.

How much was [Fill: YR_YRCUS] payment on this [Fill: mortgage/lump sum home equity loan] in [fill: REF_MO]?

Valid values <1 - 99999999, D, R > [if any codes 3 to 6 selected in 8500.PAYINCL or PYRINIJ
goto PRNINJX1, else goto PYMTJX2]

>Variable Name PYMTJX1 **Description** [fill: REF_MO] Payment

This question is only asked for non-Fixed Rate mortgages – FIXEDRTJ = 2.

How much of that amount is for [fill: principal/interest/principal and interest]?

Fill based on whether codes 1 and 2 are both selected in PYRINIJ

Valid values <0 - 99999999, D, R> goto PYMTJX2

>Variable Name PRNINJX1 **Description** [fill: REF_MO] Principal/interest amount

This question is only asked for non-Fixed Rate mortgages – FIXEDRTJ = 2.

How much was [Fill: YR_YRCUS] payment on this [Fill: mortgage/lump sum home equity loan] in [fill: TWO_MONTH]?

Valid values <1 - 99999999, D, R > [if any codes 3 to 6 selected in 8500.PAYINCL or PYRINIJ
goto PRNINJX2, else goto PYMTJX3]

>Variable Name PYMTJX2 **Description** [fill: TWO_MONTH] Payment

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This question is only asked for non-Fixed Rate mortgages – FIXEDRTJ = 2.

How much of that amount is for [fill: principal/interest/principal and interest]?

Fill based on whether codes 1 and 2 are both selected in PYRINIJ

Valid values <0 - 99999999, D, R> goto PYMTJX3

<u>>Variable Name</u>	PRNINJX2	Description	[fill: TWO_MONTH] Principal/interest amount
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How much was [Fill: YR_YRCUS] payment on this [Fill: mortgage/lump sum home equity loan] in [fill: LAST_MONTH]?

Valid values <1 - 99999999, D, R > [if any codes 3 to 6 selected in 8500.PAYINCL or PYRINIJ
goto PRNINJX3, else goto next loan also goto ADDMORT]

>Variable Name PYMTJX3 **Description** [fill: LAST_MONTH] Payment

This question is only asked for non-Fixed Rate mortgages – FIXEDRTJ = 2.

How much of that amount is for [fill: principal/interest/principal and interest]?

Fill based on whether codes 1 and 2 are both selected in PYRINIJ

Valid values <0 - 99999999, D, R> goto next loan else goto ADDMORT

>Variable Name PRNINJX3 **Description** [fill: TWO_MONTH] Principal/interest amount

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Attachment B - Section 3B Changes
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**These questions will go after PROPDESC and before STILOWNB in Section 3B. COUNTRY and STATE will move up in the section.
Delete VSHARED and VTIMESHR.**

Universe - OWNYB = 300 and value in PROPDESC

Is this a time-sharing arrangement where [Fill: YOU_YRCU] [Fill: HAVE_HAS2] use of the property only for a specified time period each year?

1. Yes - goto SHARWKS
2. No - goto SHARED2

>Variable Name	Description	
TIMESHAR		Timeshare

How many weeks per year can [fill: YOU_YRCU] use your timeshare?

Valid values <1 - 52, D, R> goto SHARED1

>Variable Name	Description	
SHARWKS		Weeks available

[fill: Do/Does] [fill: YOU_YRCU] own the timeshare with anyone else outside your CU?

1. Yes - goto SHARPER1
2. No - goto S3B_END

>Variable Name	Description	
SHARED1		Timeshare co-owner

What percent of the timeshare [fill: do/does] [fill: YOU_YRCU] own?

Valid values <1-99, D, R> - goto COUNTRY

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>Variable Name SHARPER1 **Description** Timeshare percent

Universe - OWNYB = ANY and TIMESHAR ne 1

[fill: Do/Does] [fill: YOU_YRCU] share ownership of the property with anyone else outside your CU?

1. Yes - goto SHARPER2
2. No - goto STILOWNB

>Variable Name SHARED2 **Description** Share ownership

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What percent of the property [fill: do/does] [fill: YOU_YRCU] own?

Valid values <1-99, D, R> - goto COUNTRY

<u>>Variable Name</u>	Description	Percent of ownership
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This question will be asked for all OWNYB = 300 regardless of timeshare status.

* Ask if not apparent

Where [fill: is/was] the property located?

* If this is a timeshare with multiple locations, select the most often used location.

1. United States – goto STATE
2. Foreign Country - goto STILOWNB

<u>>Variable Name</u>	Description	Property Location
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* Enter the two character State abbreviation.

Valid values: <2 character state abbreviation, D, R> - goto CNTYCODE

<u>>Variable Name</u>	Description	State
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This field should mimic the coding of vehicle makes and models.

What county is the property located in?

* Enter the three character FIPS County abbreviation

* If vehicle make and model is not found, key X

Valid values: <30 characters, D, R> [goto STILOWNB]
<X> [goto OTHCNTY]

<u>>Variable Name</u>	CNTYCODE	Description	County
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>Special Instructions

1. Insert a Blaise alpha search function. Give the FR the option of switching to a tri-gram search. Display the list of FIPS County codes (to be provided by BLS) and allow the interviewer to highlight and select the appropriate county. On the grid, replace the keyed-in characters in the "County" field with the FULL county name selected from the list. Then store the appropriate code in FIPSCODE.
2. If X is entered then store XXX in FIPSCODE.

* Specify other make and model.

Valid values: <30 characters> - goto STILOWNB

>Variable Name	Description
OTHCNTY	Other County

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Attachment C - Section 03F Changes to Mortgage Questions
August 24, 2006

These questions replace the variables currently found in Section 03F. Some of the variable names will remain the same.

This becomes the first variable in the section. REFINED is deleted.

Now I will ask some questions about your [Fill: 1st/2nd, 3rd, etc.] [Fill: mortgage/lump sum home equity loan]. These questions refer to the [Fill: mortgage/lump sum home equity loan] you are currently making payments on.

What was the amount of the [Fill: mortgage/lump sum home equity loan] when [Fill: YOU_YRCU] first obtained it, not including any interest?

Valid values <1-99999999, D, R> goto FRSTPYR

>Variable Name	Description	
ORGMRTX		Original Mortgage \$

In what year did [Fill: YOU_YRCU] make the first payment on this [Fill: mortgage/lump sum home equity loan]?

Valid values <1900-9999, D, R> goto FRSTPYMO

>Variable Name	Description	
FRSTPYR		First payment year

In what month did [Fill: YOU_YRCU] make the first payment on this [Fill: mortgage/lump sum home equity loan]?

Valid values <1 - 12, D, R> goto MTERM

>Variable Name	Description	
FRSTPYMO		First payment month

Is this a 30 year [Fill: mortgage/lump sum home equity loan], a 15 year [Fill: mortgage/lump sum home equity loan], or something else?

1. 30-year - goto NEWMRRT

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- 2. 15-year - goto NEWMRRT
- 3. Something else - goto MORTTERM

D, R - goto NEWMRRT

<u>>Variable Name</u> MTERM	Description	Mortgage Term
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* Enter number of years.

Valid values <1 - 50, D, R> goto NEWMRRT

>Variable Name MORTTERM **Description** Specify years

Note that OLDMRRT is deleted.

What is the current interest rate on this [Fill: mortgage/lump sum home equity loan]?

* Enter percent including decimal

Valid values <00.000 - 99.999, D, R> goto FIXEDRTE

>Variable Name NEWMRRT **Description** Current Interest Rate

Is this a fixed rate [fill: mortgage/lump sum home equity loan]?

- 4. Yes - goto PAYINCL
- 5. No – goto PAYTYPE

>Variable Name FIXEDRTE **Description** Fixed Rate

There are many different kinds of [Fill: mortgage/lump sum home equity loan]s. Which of these comes closest to [Fill: YRS_YRCS]?

* Read each item on list.

* Mark all that apply, separate with commas.

- 1. Variable or adjustable rate of interest (ARM) - goto PAYINCL
- 2. Interest only - goto PAYINCL
- 3. Other - specify - goto PAYTOHF

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If precode 3 is included goto PAYTOTHF then PAYINCL, else goto PAYINCL

<u>>Variable Name</u>	Description	Loan Type
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* Specify:

Valid value <30 characters> goto PAYINCL

<u>>Variable Name</u>	Description	Specify
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On [fill: YR_YRCUS] last payment, which of these things were included?

* Enter all that apply, separate with commas

1. Principal - if PAYTYPE ne 2 goto MRTPMTX, else if PAYTYPE eq 2 and Interview ne 1 goto PAYMTX1, else goto PAYMTX3
2. Interest - if PAYTYPE ne 2 goto MRTPMTX, else if PAYTYPE eq 2 and Interview ne 1 goto PAYMTX1, else goto PAYMTX3
3. Property taxes - if PAYTYPE ne 2 goto MRTPMTX, else if PAYTYPE eq 2 and Interview ne 1 goto PAYMTX1, else goto PAYMTX3
4. Property insurance - if PAYTYPE ne 2 goto MRTPMTX, else if PAYTYPE eq 2 and Interview ne 1 goto PAYMTX1, else goto PAYMTX3
5. Mortgage guarantee insurance - if PAYTYPE ne 2 goto MRTPMTX, else if PAYTYPE eq 2 and Interview ne 1 goto PAYMTX1, else goto PAYMTX3
6. Any other payments - specify - goto PAYOTHF

77. Don't know

<u>>Variable Name</u>	Description	Included in Payment
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* Specify:

Valid value <30 characters> if PAYTYPE ne 2 goto MRTPMTX, else if PAYTYPE eq 2 and Interview ne 1
 goto PAYMTX1, else goto PAYMTX3

<u>>Variable Name</u>	PAYOTHF	Description	Specify
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This question is only asked for Fixed Rate mortgages – FIXEDRTE = 1.

How much is [fill: YR_YRCUS] [Fill: mortgage/lump sum home equity loan] payment per month?

Valid values <1 - 99999999, D, R > [if any codes 3 to 6 selected in PAYINCL goto PRININTX,
 else goto SFG_END]

<u>>Variable Name</u>	MRTPMTX	Description	Total Loan Payment
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This question is only asked for Fixed Rate mortgages – FIXEDRTE = 1.

How much of that amount is for [fill: principal/interest/principal and interest]?

Fill based on whether codes 1 and 2 are both selected in PAYINCL

Valid values <0 - 99999999, D, R> goto SFG_END

<u>>Variable Name</u>	PRININTX	Description	Principal/interest amount
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This question is only asked for non-Fixed Rate mortgages – FIXEDRTE = 2.

How much was [Fill: YR_YRCUS] payment on this [Fill: mortgage/lump sum home equity loan] in [fill: REF_MO]?

Valid values <1 - 99999999, D, R > [if any codes 3 to 6 selected in PAYINCL goto PRNINTX1,

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else goto PAYMTX2]

>Variable Name PAYMTX1 **Description** [fill: REF_MO] Payment

This question is only asked for non-Fixed Rate mortgages – FIXEDRTE = 2.

How much of that amount is for [fill: principal/interest/principal and interest]?

Fill based on whether codes 1 and 2 are both selected in PAYINCL

Valid values <0 - 99999999, D, R> goto PAYMTX2

>Variable Name PRNINTX1 **Description** [fill: REF_MO] Principal/interest amount

This question is only asked for non-Fixed Rate mortgages – FIXEDRTE = 2.

How much was [Fill: YR_YRCUS] payment on this [Fill: mortgage/lump sum home equity loan] in [fill: TWO_MONTH]?

Valid values <1 - 99999999, D, R > [if any codes 3 to 6 selected in PAYINCL goto PRNINTX2,
else goto PAYMTX3]

>Variable Name PAYMTX2 **Description** [fill: TWO_MONTH] Payment

This question is only asked for non-Fixed Rate mortgages – FIXEDRTE = 2.

How much of that amount is for [fill: principal/interest/principal and interest]?

Fill based on whether codes 1 and 2 are both selected in PAYINCL

Valid values <0 - 99999999, D, R> goto PAYMTX3

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>Variable Name PRNINTX2 **Description** [fill: TWO_MONTH] Principal/interest amount

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This question is only asked for non-Fixed Rate mortgages – FIXEDRTE = 2.

How much was [Fill: YR_YRCUS] payment on this [Fill: mortgage/lump sum home equity loan] in [fill: LAST_MONTH]?

Valid values <1 - 99999999, D, R > [if any codes 3 to 6 selected in PAYINCL goto PRNINTX3,
else goto next loan also goto S3FG_END]

<u>>Variable Name</u>	PAYMTX3	Description	[fill: LAST_MONTH] Payment
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How much of that amount is for [fill: principal/interest/principal and interest]?

Fill based on whether codes 1 and 2 are both selected in PAYINCL

Valid values <0 - 99999999, D, R> goto next loan else goto S3FG_END

<u>>Variable Name</u>	PRNINTX3	Description	[fill: TWO_MONTH] Principal/interest amount
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Attachments D and E - Sections 04A and 04D Changes
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These questions represent all questions asked in Section 04A starting April 2007.

Now I am going to ask about bills for telephone services. Please refer to any billing statements or other records you have when answering these questions. Please remember to include any bills you receive or pay online or have automatically deducted. Report any telephone bill you have received, even if the bill has not been paid.

1. Enter 1 to Continue [goto TELEBILL]

>Variable Name	Description
S4A_INTRO	Introduction

Since the first of [fill: REF_MONTH], have [fill YOU_ANYMEM] received any bills for telephone service, including cellular telephone and Voice Over IP? Do not include bills for telephones used entirely for business purposes.

1. Yes [If interview 1, goto TELCOMP]
[else, goto PREVCOMP]
2. No [goto S4A_END]
D, R [goto S4A_END]

>Variable Name	Description
TELEBILL	Bills for tel/pager

Ask in Interviews 2 through 5 when telephone bills were reported in the previous interview.

What is the name of the company which provides the service?

[fill: company names reported last interview]

55. Company name not listed

888. Delete

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Valid values: <1-20> [store company name in TELCOMP and goto TELBSNS]
 <55> [goto TELCOMP]
 <888> [goto next line on grid]

<u>>Variable Name</u>	PREVCOMP	Description	Prev comp
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Ask in Interview 1 or in Interviews 2 through 5 when no telephone bills were reported in the previous interview.

What is the name of the company which provides the service?

* Enter 888 to delete.

Valid values: <30 characters> [goto TELBSNS]
<888> [goto next line on grid]

<u>>Variable Name</u>	TELCOMP	Description	Comp name
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Will any of the charges be deducted as a business expense?

1. Yes [goto TELBSNZ]
2. No [if Interview = 1 goto TELCHGX3, else goto TELCHGX1]
D, R [if Interview = 1 goto TELCHGX3, else goto TELCHGX1]

<u>>Variable Name</u>	TELBSNS	Description	Bus exp
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What percentage will be deducted?

Valid values: <1-99, D,R> [if Interview = 1 goto TELCHGX3, else goto TELCHGX1]
<100> [goto, next line of grid.]

<u>>Variable Name</u>	TELBSNZ	Description	% Ded
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How much were you billed for in [fill: REF_MO]? Do not include any unpaid charges from a previous billing period.

Valid values: <0-999999, D, R> [goto TELCHGX2]

<u>>Variable Name</u>	TELCHGX1	Description	[fill: REF_MO] charges
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How much were you billed for in [fill: TWO_MONTH]? Do not include any unpaid charges from a previous billing period.

Valid values: <0-999999, D, R> [goto TELCHGX3]

>Variable Name TELCHGX2 **Description** [fill: TWO_MONTH] charges

How much were you billed for in [fill: LAST_MONTH]? Do not include any unpaid charges from a previous billing period.

Valid values: <0-999999, D, R> [If TELCHGX1 ne 0 AND TELCHGX2 AND 0 or TELCHGX3 AND 0
goto TYPETEL else goto BILLPERD]

>Variable Name TELCHGX3 **Description** [fill: LAST_MONTH] charges

What is your usual billing period for the service?

1. Month [goto TYPETEL]
 2. 2 months [goto TYPETEL]
 3. Quarter [goto TYPETEL]
 4. Annual [goto TYPETEL]
 5. Other [goto TYPETEL]
- D, R [goto TYPETEL]

>Variable Name BILLPERD **Description** Bill Perd

GOTO IF TELCHGX1 ne 0 or TELCHGX2 ne 0 or TELCHGX3 ne 0 or entry in BILLPERD

What types of telephone services did the bill include?

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- * Enter all that apply, separate with commas.
- * Read each item on list.

1. Residential Service [goto TELTEMP]
 2. Mobile/Cellular Service [goto TELTEMP]
 3. Voice Over IP Service [goto TELTEMP]
- D, R [goto TELTEMP]

>Variable Name TYPETEL **Description** Type serv

Which of the following telephone service items were included in the bill(s)?

- * Enter all that apply, separate with commas.
- * Read each item on list.

0. None
 1. Internet access (including broadband, DSL, or dial-up)
 2. Cable or satellite television service
 3. Non-telephone related rentals or purchases such as modems.
77. Misc. Combined (unable to specify/DK)

Skip instructions: <0> [goto TELOTH]
 <1-3, 77> [if 77 only, goto TELOTH]
 [if 1 is selected and Interview = 1 goto TINTNTX3, else goto TINTNTX1]
 [if 2 is selected and Interview = 1 goto TCABLEX3, else goto TCABLEX1]
 [if 3 is selected and Interview = 1 goto NTRTPRX3, else goto NTRTPRX1]
 <R> [goto TELOTH]

>Variable Name TELTEMP **Description** Tel serv

How much of the [fill: REF_MO] charges were for internet access?

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Valid values: <0-999999,D,R> [goto TINTNTX2]

>Variable Name	TINTNTX1	Description	Inter Amt 1
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How much of the [fill: TWO_MONTH] charges were for internet access?

Valid values: <0-999999,D,R> [goto TINTNTX3]

>Variable Name	TINTNTX2	Description	Inter Amt 2
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How much of the [fill: LAST_MONTH] charges were for internet access?

Valid values: <0-999999,D,R> [if entry of 2 in TELTEMP and Interview = 1 goto TCABLEX3, else goto TCABLEX1]
 [if entry of 3 in TELTEMP and Interview = 1 goto NTRTPRX3, else goto NTRTPRX1]
 [else goto TELOTH]

>Variable Name	TINTNTX3	Description	Inter Amt 3
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How much of the [fill: REF_MO] charges were for cable or satellite television service?

Valid values: <0-999999,D,R> [goto TCABLEX2]

>Variable Name	TCABLEX1	Description	Cable Amt 1
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How much of the [fill: TWO_MONTH] charges were for cable or satellite television service?

Valid values: <0-999999,D,R> [goto TCABLEX3]

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Did [fill: YOU_ANYMEM] receive any other bills for telephones or pagers not used entirely for business purposes?

1. Yes [goto TELCOMP, next line of grid]
2. No [goto S4A_END]

<u>>Variable Name</u>	TELOTH	Description	Any More
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These questions represent all of the questions in Section 04D.

Now I am going to ask about utility bills. Please refer to any billing statements or other records you have when answering these questions. Please remember to include any bills you receive or pay online or have automatically deducted. Report any utility bill you have received, even if the bill has not been paid.

1. Enter 1 to Continue [goto UTC_ITEM]

>Variable Name	S4D_INTRO	Description	Introduction
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Since the first of [fill: REF_MONTH], have [fill: YOU_ANYMEM] received any bills for any of the following utilities, fuels, or services? Do not include bills for properties used entirely for business.

* Read each item on list:

- | | |
|-------------------------------|-----------------------------|
| 1. Electricity | 6. Piped-in water |
| 2. Natural or utility gas | 7. Sewerage maintenance |
| 3. Fuel oil | 8. Trash/garbage collection |
| 4. Bottled or tank gas | 9. Water softening service |
| 5. Other fuels including wood | 10. Septic tank cleaning |

99. None/No more entries

888. Delete

Valid Values: <1-10> [goto WHATPROP]
<99> [goto S4C_END]
<888> [goto next line on grid]

>Variable Name	UTC_ITEM	Description	Item
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Which property was the bill for?

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[fill: all PROPNUM, PROPDESC from Section 3] [If UTC_ITEM = 1-3, 6-8 and interview =1, goto COMPNAME] [else if UTC_ITEM = 1-3, 6-8 and interview ne 1, goto LASTCOMP] [else goto UTILBUSN]

[fill: 40. Rented sample unit] [If UTC_ITEM = 1-3, 6-8 and interview =1, goto COMPNAME] [else if UTC_ITEM = 1-3, 6-8 and interview ne 1, goto LASTCOMP] [else goto UTILBUSN]

[fill: 41. Other rental unit] [goto UTLPDESC]
 42. Rented vacation property [goto UTLPDESC]
 43. Property not owned or rented by CU [goto UTLPDESC]

>Variable Name WHATPROP **Description** Prop

* Briefly describe the property.

Valid values: <30 characters> [If UTC_ITEM = 1-3, 6-8 and interview =1, goto COMPNAME] [else if UTC_ITEM = 1-3, 6-8 and interview ne 1, goto LASTCOMP] [else goto UTILBUSN]

>Variable Name UTLPDESC **Description** Prop oth

What is the name of the company or government agency which provides [fill: description]?

Valid values: <30 characters> [goto UTILBUSN]

>Variable Name COMPNAME **Description** Company

What is the name of the company or government agency which provides [fill: description]?

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[fill: company names reported last interview]

55. Company name not listed

888. Delete

Valid values: <1-20> [store company name in COMPNAME and goto UTILBUSN]

<55> [goto COMPNAME]

<888> [goto next line on grid]

>Variable Name LASTCOMP **Description** Prev comp

Will any part of the [fill: description] charges be deducted as a business expense?

1. Yes [goto HAVEBILL]

2. No [goto HAVEBILL]

D, R [goto HAVEBILL]

>Variable Name UTILBUSN **Description** Bus exp

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* Does the respondent have any bills or statements showing any of the charges?
Answer NO if only checkbook records are being used.

1. Yes [if interview = 1 got UTLCHGX3, else goto UTLCHGX1]
2. No [if interview = 1 got UTLCHGX3, goto UTLCHGX1]
D, R [if interview = 1 got UTLCHGX3, goto UTLCHGX1]

>Variable Name HAVEBILL **Description** Bills

How much were you billed for in [fill: REF_MO]?

Valid values: <0-999999, D, R> [goto UTLCHGX2]

>Variable Name UTLCHGX1 **Description** Amount 1

How much were you billed for in [fill: TWO_MONTH]?

Valid values: <0-999999, D, R> [goto UTLCHGX3]

>Variable Name UTLCHGX2 **Description** Amount 2

How much were you billed for in [fill: LAST_MONTH]?

Valid values: <0-999999, D, R> [if UTLCHGX1 ne 0 AND UTLCHGX2 ne 0 AND UTLCHGX3 ne 0
goto UTILCMB_S else goto BLPERIOD]

>Variable Name UTLCHGX3 **Description** Amount 3

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What is your usual billing period for the service?

1. Month [goto UTILCMB_S]
2. 2 months [goto UTILCMB_S]
3. Quarter [goto UTILCMB_S]
4. Annual [goto UTILCMB_S]
5. Other [goto UTILCMB_S]
D, R [goto UTILCMB_S]

<u>>Variable Name</u>	BLPERIOD	Description	Bill Perd
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* Enter 'C' for a combined expense

Valid values: <C> [goto UTILCMB]
 <empty> [goto MOREBILL]

>Variable Name UTILCMB_S **Description** C

What other utilities, fuels, or services was [fill: description] combined with?

* Enter all that apply, separate with commas.

- | | |
|-------------------------------|---|
| 1. Electricity | 6. Piped-in water |
| 2. Natural or utility gas | 7. Sewerage maintenance |
| 3. Fuel oil | 8. Trash/garbage collection |
| 4. Bottled or tank gas | 9. Water softening service |
| 5. Other fuels including wood | 10. Septic tank cleaning |
| | 77. Misc. combined (unable to specify/DK) |

Valid values: <1-10, 77> [goto MOREBILL]

>Variable Name UTILCMB **Description** Combined codes

Did you receive any other [fill: description] bills?

1. Yes [goto UTC_ITEM, next line of grid]
 2. No [goto UTC_ITEM, next line of grid]
- D,R [goto UTC_ITEM, next line of grid]

>Variable Name MOREBILL **Description** Any more

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Attachment F - Section 19A Changes
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This is how the pre-codes should be grouped for Section 19A beginning April 2006. All groups with their own screeners are moving after pre-codes with no screeners.

Changes to the combined code screens are found at the end.

Changes to which codes can no longer have the option of reporting a continuous expense can also be found at the end.

SCREEN 1

(Book) 59 - 61 ? [F1]

Since the first of [fill: REF_MONTH], have [fill: YOU_ANYMEM] had expenses for any of the following, either for [fill: YOU_YRCU] or for someone outside your CU?

* Read each item on list.

1. Fresh flowers or potted plants MISCCODE = 140
2. Professional photography MISCCODE = 360
3. Services of lawyers or other legal professionals MISCCODE = 150
4. Accounting fees MISCCODE = 160
5. Occupational expenses, such as union dues or professional licenses MISCCODE = 380
6. Gardening or lawn care services MISCCODE = 170
7. Housekeeping services MISCCODE = 180
8. Home security system service fees MISCCODE = 370
9. Other home services or small repair jobs around the house, not previously reported
MISCCODE = 210
10. Moving, storage, or freight MISCCODE = 230
11. Care for invalids, convalescents, handicapped, or elderly persons in the home
MISCCODE = 200
12. Adult day care centers MISCCODE = 350
13. Stamp or coin collecting MISCCODE = 400
14. Lotteries or games of chance MISCCODE = 390

95. Continue
888. Delete the line

SCREEN 2

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(Book) 59 - 61 ? [F1]

Have [fill: YOU_ANYMEM] had expenses for babysitting, nanny services, or other childcare, not already reported, either for [fill: YOU_YRCU] or for someone outside your CU?

* IF YES - Read each item on list.

Were your expenses for -

15. Babysitting, nanny services, or other child care in YOUR home? MISCCODE = 190

16. Babysitting, nanny services, or other child care in someone ELSE's home?

MISCCODE = 220

95. Continue

888. Delete the line

SCREEN 3

(Book) 59 - 61 ? [F1]

Have [fill: YOU_ANYMEM] had expenses for toys, games, or arts and crafts kits, either for [fill: YOU_YRCU] or for someone outside your CU?

* IF YES - Read each item on list.

Were your expenses for -

17. Toys or games? MISCCODE = 330

18. Arts or crafts kits? MISCCODE = 340

95. Continue

888. Delete the line

SCREEN 4

**2007 CEQ Instrument Requirements
Attachment F - Section 19A Changes
August 24, 2006**

(Book) 59 - 61 ? [F1]

Have [fill: YOU_ANYMEM] had expenses for the purchase of pets, pet supplies, pet medicines, pet services, or veterinarian services, either for [fill: your/your CU's] pets or for pets belonging to someone outside your CU?

* IF YES - Read each item on list.

Were your expenses for -

- 19. Purchase of pets, pet supplies, or medicine for pets? MISCCODE = 240
- 20. Pet services? MISCCODE = 250
- 21. Veterinarian expenses for pets? MISCCODE = 260

- 95. Continue
- 888. Delete the line

SCREEN 5

(Book) 59 - 61 ? [F1]

Have [fill: YOU_ANYMEM] had expenses for catered affairs, parties, or events, either for [fill: YOU_YRCU] or for someone outside your CU?

* IF YES - Read each item on list.

Were your expenses for -

- 22. Food and beverages for catered affairs? MISCCODE = 130
- 23. Live entertainment? MISCCODE = 410
- 24. Rental of party supplies? MISCCODE = 420

- 95. Continue
- 888. Delete the line

SCREEN 6

**2007 CEQ Instrument Requirements
Attachment F - Section 19A Changes
August 24, 2006**

(Book) 59 - 61 ? [F1]

Have [fill: YOU_ANYMEM] had expenses for the purchase or upkeep or cemetery lots or vaults or for funerals, burials, or cremation, either for [fill: YOU_YRCU] or for someone outside your CU?

* IF YES - Read each item on list.

Were your expenses for -

- 25. Purchase or upkeep of cemetery lots or vaults? MISCCODE = 110
- 26. Funerals, burials, or cremation? MISCCODE = 100

- 99. None/no more entries
- 888. Delete the line

<u>>Variable Name</u>	MIS_ITEM	Description	Item
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Do NOT allow a valid value of 13 in MISCMO for the following pre-codes:

2, 9, 13, 17, 18, 22, 23, 24

Only bring up S19ACM_S for pre-codes 17 through 26.

On S19ACMB allow combining the following groups of pre-codes:

- Pre-codes 17 and 18.
- Pre-codes 19, 20, and 21.
- Pre-codes 22, 23, and 24.
- Pre-codes 25 and 26.

**2007 CEQ Instrument Requirements
Attachment G - Section 14C Changes
August 24, 2006**

This attachment contains the Medicare Part D questions that will change in April 2007 for returning CUs in interviews 3 to 5. Changes are highlighted.

This question is asked when (Intnubr = 3-5) AND 14C_UPDATE is not empty

Is [fill: NAME] still enrolled in a Medicare Prescription Drug plan?

* Enter 'Yes' if the member changed to a different Medicare Prescription Drug plan.

1. Yes
2. No

>Variable Name	STILDRUG	Description	Still in Part D
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>Value/Skip Instructions

<1> [goto PREMCHG]

<2, D, R> [goto next member on 14C_UPDATE; if no more members on 14C_UPDATE but more members in the CU, goto RETPARTD; else if 8500.MDCDENR ne 1 goto MDCDENR; else goto CHGMDCDE]

This question is asked when (Intnubr = 3-5) AND STILDRUG eq 1

Is [fill: NAME]'s premium still [fill:\$ 8500.DRGPRMX / the same]?

1. Yes
2. No

2007 CEQ Instrument Requirements
Attachment G - Section 14C Changes
August 24, 2006

>Variable Name PREMCHG **Description** Premium the same

>Value/Skip Instructions

<1,D, R> [goto STILDRUG next member on 14C_UPDATE; if no more members on
14C_UPDATE but more members in the CU, goto RETPARTD; else if

8500.MDCDENR ne 1 goto MDCDENR; else goto CHGMDCDE]

<2> [goto PREMCHGX]

>Fill Instructions

1. 8500.DRGPRMX eq D or R fill "the same" else fill "\$ 8500.DRGPRMX".

**2007 CEQ Instrument Requirements
Attachment G - Section 14C Changes
August 24, 2006**

This question is asked when (Intnmbr = 3-5) AND PREMCHG eq 2

What is [fill: NAME]'s current premium amount for the Medicare Prescription Drug Plan?

>Variable Name PREMCHGX **Description** New Premium Amt

>Value/Skip Instructions

<0 - 999,D, R> [goto STILDRUG next member on 14C_UPDATE; if no more members on 14C_UPDATE but more members in the CU, goto RETPARTD; else if 8500.MDCDENR ne 1 goto MDCDENR; else goto CHGMDCDE]

This question is asked when <CHGHHMCR = 2, D, or R OR HHMCRCOV = 0-30) AND (Intnumbr 3-5 AND NOT new CU) AND there are CU members not on 14C_UPDATE.

>Question Text

Are [fill: YOU_ANYMEM] presently enrolled in a Medicare Prescription Drug plan?

* The Medicare Prescription Drug plan is also known as Medicare Part D, which is the plan that began enrollment in November 2005.

1. Yes
2. No

>Variable Name RETPARTD **Description** Enrolled in Medicare Part D

>Value/Skip Instructions

<1> [goto DRUGPLAN]

**2007 CEQ Instrument Requirements
Attachment G - Section 14C Changes
August 24, 2006**

<2, D,R> [if 8500.MDCDENR = 1, goto CHGMDCDE, if 8500.MDCDENR ne 1, goto MDCDENR]